INSTRUCTOR PERCEPTIONS OF WHAT GOOD LEAD FACILITATORS DO IN LONG-STANDING, CO-CURRICULAR, MULTI-DAY, UNDERGRADUATE LEADERSHIP PROGRAMS

BY

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DISSERTATION

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Abstract

Instructor Perceptions of What Good Lead Facilitators do in Long-Standing, Co-Curricular, Multi-Day, Undergraduate Leadership Programs is an exploratory, qualitative study of what good teachers do in long-standing, outside-of-the-classroom, institute programs for university and college students. In-depth interviews of 15 instructors (identified as excellent by their organization) identified and explained current practices of excellent instruction (facilitation). Twenty-seven categories of facilitation behaviors emerged. Eleven categories mapped to meta studies about good teaching in the classroom, six categories mapped to an early research project on student perceptions of good lead facilitators, and ten unique categories came from the lead facilitators themselves. Recommendations for training and the evaluation of lead facilitators are presented.

To my family and the teachers who have inspired me

Acknowledgments

Since college I have been fascinated with how to be a great teacher. Or conversely, how not to suck as one. How does someone not be that teacher that students despise? We have all likely experienced the full spectrum: from awe-inspiring teachers to those who made us fall asleep. Throughout my life and formal education, I have been lucky to be surrounded by passionate teachers who lit my mind on fire. Often, my learning was not connected to a particular subject, nor did it necessarily happen in a classroom. It was connected to individuals who truly believed in what they were teaching and who had achieved mastery of joining with students in the pursuit of truth. Bottom line, it's because they care. And because they do, they embark on a continual improvement process that helps them, and others, get better every time.

Fifteen wonderful, giving, and selfless individuals shared their innermost thoughts, beliefs, and passions while serving as co-investigators with me in this quest to gain insight into what some of the best teachers do in these multi-day, co-curricular, undergraduate college and university leadership institutes. Listening to them and talking with them has made me want to be a better person and a better instructor. They inspire me.

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Definition of Terms

ACUI	Association of College Unions International
I-LEAD®	The Institute for Leadership Education and Development
NIC	North-American Interfraternity Conference
UIFI	Undergraduate Interfraternity Institute
Wooden Institute	John and Nellie Wooden Institute for Men of Principle

Chapter 1

Introduction

Undergraduate leadership programs

Undergraduate leadership education programs are on the rise across the United States and have expanded exponentially since the 1980s (Dugan & Komives, 2007; F. H. Freeman, Knott, & Schwartz, 1996; Stoker, 2010). The National Clearinghouse for Leadership Programs lists more than 100 organizations and associations involved in leadership programs (National Clearinghouse for Leadership Programs, 2011a). As of the late 1990s, there were academic and co-curricular leadership programs on approximately 700 U.S. college and university campuses (Schwartz, Axtman, & Freeman, 1998). Recent sources suggest that there are undergraduate leadership programs at more than 1,000 higher education institutions (C. Brungardt, Greenleaf, Brungardt, & Arensdorf, 2006; Komives et al., 2011; Scott, 2004).

Undergraduate leadership programs span a wide continuum of configurations and menu options. A critical distinction exists between academic programs (those that occur inside the classroom) and co-curricular programs (those conducted outside the traditional classroom setting). Some of the recent growth in undergraduate leadership programs can be attributed to co-curricular programs housed in student affairs or residence life (C. Brungardt et al., 2006), while some stems from academic courses, concentrations, and certificate programs (Riggio, Ciulla, & Sorenson, 2003).

More research about undergraduate leadership programs has been conducted in the academic arena than about co-curricular programs. Some information is known about how to teach leadership through academic programs (in the classroom) but far less is known about teaching in co-curricular programs (outside of the classroom). Co-curricular leadership

programming happens in many different forms – from weekend retreats, to one-hour workshops, to week-long programs. A current conversation in the field of leadership is whether the sum the collective efforts are really focused on leadership education or leadership development (C. Brungardt, 1997; Engbers, 2006). Is it just about teaching leadership or are the students being given the opportunity to practice and do leadership? A preponderance of the literature about teaching leadership education and development is focused on academic, classroom instruction. Less is known about what do good teachers do in outside-of-the-class, co-curricular programs. Does good teaching differ in different environments? Co-curricular programs are different in that they are conducted without academic grading and judgment, which could feel as though professors are assessing personal worth and assigning the value that is inherent in grading. Furthermore, professors regularly teach as a part of their academic course load whereas others who are not faculty – staff, administrators, or other individuals – are often the ones who teach co-curricular leadership programs. Little is known about how this leadership education is delivered effectively. Despite the massive growth and proliferation of leadership offerings, questions still remain on how to best conduct leadership education and development. To better understand the leadership education landscape in higher education, it is important to know the history and growth of this field, as well as what types of co-curricular leadership education programs are offered currently at colleges and universities.

Growth of leadership education in higher education

Dugan and Komives (2007) identified four primary trends that have led to the formalization of leadership programs in higher education. These trends include the expansion of curricular and co-curricular leadership programs, new and focused theoretical and conceptual leadership models, recent professionalization in leadership education, and increased attention on

leadership research. More recently, in *The Handbook for Student Leadership Development*, Komives et. al (2011) identified six similar trends as contributing factors in the growth of leadership education. Those trends were: (1) associations and their support, (2) centers, institutes, and the leadership industry, (3) scholarship (e.g. leadership journals, theories and conceptual models, theoretical integration), (4) programmatic and pedagogical differentiation (e.g. academic programs, experiential learning), (5) leadership standards, and (6) assessment and research (Komives et al., 2011). Leadership programming and education is often termed or associated as transformative learning or transformational leadership (Astin & Astin, 2000; Barbour & Hickman, 2011; Baumgartner, 2001; Mezirow & Associates, 2000; E. W. Taylor, 2006).

Co-curricular undergraduate leadership education

Student learning occurs through intentional engagement outside the classroom, encouraging rich dialogue and purposeful programs (Shushok Jr., Henry, Blalock, & Sriram, 2009). Researchers have found that successful learning environments for students are collaborative, involve all areas of the academy, and support their holistic education (Kuh, Kinzie, Schuh, Whitt, & Associates, 2005).

Leadership education efforts range widely from campus to campus. They may take the form of a workshop, a weekend retreat, or a multi-day seminar. In *The Handbook for Student Leadership Development (2nd ed.)* (2011), there is an entire chapter designated to co-curricular collaborations between student and academic affairs. The Handbook provides examples of areas of the academy that sponsor or administer undergraduate leadership programs. These areas include a wide range of offices and programs, including but not limited to academic affairs, athletics and recreation (e.g. campus recreation programs, intercollegiate athletics and club

sports), campus activities (e.g. fraternities and sororities, residence life), student organizations, community engagement, cultural and social identity programs (e.g. dialogue programs, disability support programs, multicultural affairs and student centers), employment and professional preparation, international education and study abroad, and ROTC programs (Komives et al., 2011).

Regardless of the sponsoring program or organization there are two main formats in which co-curricular undergraduate leadership programs take place – one-time programs (e.g. conferences, retreats, workshops, lectures) and sequential programs (e.g. workshop and program series, emerging leaders programs, co-curricular leadership certificate programs, global leadership programs, multi-year programs) (Komives et al., 2011). This study focuses on one-time, multi-day, co-curricular programs only.

Multi-day co-curricular undergraduate leadership programs

LeaderShape®

LeaderShape®'s flagship program, The LeaderShape® Institute, celebrated 26 years in 2012. The LeaderShape® Institute was critically evaluated and named as one of the exemplary programs of 31 studied by the W.K. Kellogg Foundation's *Leadership in the making: Impact and insights from leadership development programs in U.S. colleges and universities* (Zimmerman-Oster & Burkhardt, 1999a, 1999b). Doctoral dissertations have focused on The LeaderShape® Institute through its longitudinal impact (Stoker, 2010) and program impact on student leaders (Pugh, 2000). Master's theses have provided additional insight regarding the impact of The LeaderShape® Institute through student perceptions of leadership and participants' development as student leaders (Dial, 2006). Conference programs and papers have provided additional analysis and insight into the program (McRee, Roberts, & Osteen, 2006; Summers, Davis, &

Tomovic, 2004; Zogg & Mastalski, 2008). The value of the program as an immersion leadership experience has been declared (Pyrz, 2011). Portions of the curriculum have been shared as good examples of how to work with students (Barbuto Jr., Bugenhagen, Stohs, & Matkin, 2003; Tener & Fisher, 1997). Examples of the program's impact on students have been highlighted through campus-based sessions of The LeaderShape® Institute (Rosch, Edwards, & Pariano, 2011). Furthermore, institutions have conducted their own assessments of the impact of The LeaderShape® Institute (Ballard et al., 2000). LeaderShape®, as an organization, also has been highlighted as a strong model of leadership within the nonprofit world (Sheehan Jr., 1996, 1999, 2010).

The LeaderShape® Institute may be best described in Komives et. al (2011) *The Handbook for Student Leadership Development (2nd ed.),* which states:

> "Examples of evidence-based leadership programming abound. The LeaderShape® Institute is a phenomenal example of an individual leadership experience that successfully embeds multiple high-impact learning strategies to enhance student learning. LeaderShape® is a six-day intensive retreat experience focused on building college students' leadership capacities (see www.leadershape.org for more information). The curriculum integrates theoretical leadership content consistent with contemporary philosophies with a delivery that taps into many of the positive influences identified in the literature. Specifically, the program provides extensive opportunities for group interaction that stimulate critical self-reflection. Groups also build trust and engage in experiential learning designed to enhance students' leadership efficacy as well as capacity. The content incorporates sociocultural conversations both across the curriculum as well as in a focused section that allows participants to delve deeply into issues related to power, privilege, and oppression. Mentoring also plays a key role, with participants interacting with adult facilitators and building relationships that continue well beyond the boundaries of the six-day experience" (p. 79).

Other long-standing, multi-day, co-curricular undergraduate leadership programs

In addition to The LeaderShape® Institute, there are a few multi-day, co-curricular leadership development programs that have been in existence for at least 10 years. Stoker (2010)

referred to these programs as character-based leadership programs. Some programs were founded as a result of individual's participation in The LeaderShape® Institute. The North-American Interfraternity Conference's (NIC) Undergraduate Interfraternity Institute (UIFI), the Association of College Unions International's (ACUI) I-LEAD® program, and Beta Theta Pi fraternity's John and Nellie Wooden Institute for Men of Principle are examples of 5- or 6-day co-curricular leadership programs. UIFI has been conducted for 23 years, I-LEAD® for 19 years, and the Wooden Institute for 14 years. Limited empirical research has been conducted about these programs. The one published research study about UIFI is a master's thesis, conducted in 1997, that focuses on learning outcomes and student perceptions of the most important leadership skills needed versus most frequently used since their attendance (Maxwell, 1998). The only published research about I-LEAD® is a journal article that discusses the program's format, curriculum, theoretical foundations, outcomes, and program administration (Rudisille & Violett, 2011). A dissertation about the Wooden Institute employed longitudinal analysis to determine the impact of this leadership education program on six student attendees (DiPaolo, 2004, 2008, 2010). Additional research regarding the Wooden Institute examines the program's impact on student participant individual outcomes (Biddix & Underwood, 2010; Bureau, 2010). Although no specific programs were named, a recent study noted that some national sorority organizations offer leadership institutes as well (G. E. Taylor, 2010).

Research about teaching

While there has been research conducted on the process and impact of some multi-day, co-curricular leadership programs, little is known about the "teaching" performed in these programs. What we do know is there is a significant amount of research on effective teaching in the classroom (Angelo, 1993; Baslow, Phelan, & Capotosto, 2006; Carson, 1996; Cashin, 1988,

1989, 1990; Feldman, 1989a, 1989b; Hativa, Barak, & Simhi, 2001; Porter & Brophy, 1988; Seldin, 2000; Silvestri, 2005), regardless of the content area. We also know there is recent growth in the body of knowledge regarding classroom teaching of leadership (C. Brungardt et al., 2006; Dugan, 2006; Dugan & Komives, 2007; Komives, Dugan, Owen, Slack, & Wagner, 2006; Komives et al., 2011; Lewis, 1995; Watt, 1995, 1997, 2003; Zimmerman-Oster & Burkhardt, 1999a, 1999b). Additionally, the importance of teaching, specifically the role of K-12 teachers and their preparation, has reentered the spotlight (Ball, 2011; Helland & Rosenthal, 2011; Morse, 2011, February 10; Snider, 2011, April 26).

These three factors provide both background and support for the study of teaching in the growing arena of multi-day, co-curricular leadership programs. These factors are discussed in greater detail below.

Research from teaching in the classroom

"The critical characteristics of effective teaching have been identified in the more than 10,000 studies on teaching effectiveness published in the last 20 years. Those studies are in general agreement" (Seldin, 2000).

Through the years, researchers have identified common characteristics, or traits, of effective teachers. The most common characteristics of effective teachers in a traditional college classroom setting include:

- Well organized
- Expert presentation/delivery
- Mastery of content/knowledge
- Student-centered
- Care and compassion
- Passion and enthusiasm
- Fair/timely feedback
- Available to students
- Good course design
- Conducive learning environment

- Clear and effective communication

These common characteristics are illustrated in Table 1 (McRee, 2010) as cited by different researchers.

Table 1

Summary of Characteristics of Effective Teachers in Traditional Classroom Settings.*

	Porter (1988)	Cashin (1989)	Feldman (1989)	Carson (1996)	Hativa (2001)	Silvestri (2005)	Baslow (2006)
Well Organized	X	X	X		X	X	X
Expert Presentation/ Delivery	X	X	X	X		X	
Master of Content/ Knowledge	X	X	X			X	X
Student-Centered	X			X	X	X	X
Care & Compassion			X	X	X	X	
Passion/ Enthusiasm			X		X	X	X
Availability to Students		X	X	X			X
Fair/Timely Feedback	X	X	X		X		
Good Course Design		X			X	X	
Conducive Learning Environment			X		X		
Clarity & Effective Communication	X		X				

* McRee, M. A. (2010). *Student perceptions of effective instructor's behaviors/characteristics when learning in non-traditional (co-curricular) college and university leadership programs.* (Early Research Project), University of Illinois, Urbana-Champaign, IL.

It is important to note how these characteristics were identified in the aforementioned studies. The majority of studies utilized student ratings as their primary source of information (Baslow et al., 2006; Carson, 1996; Cashin, 1989; Feldman, 1989a, 1989b; Hativa et al., 2001). Other methods included analyses of teacher self-reported skills and traits (Feldman, 1989b; Hativa et al., 2001; Porter & Brophy, 1988; Silvestri, 2005), instructional videotapes (Hativa et al., 2001), and ratings from colleagues, administrators, and observers (Feldman, 1989b). Despite the variation in researchers, data sources, and data collection methods, there is a striking similarity among the characteristics of effective teachers identified in each of these studies.

Other characteristics of effective teachers in traditional classroom settings are: teaching students meta-cognitive strategies and giving them (students) opportunities to master them, addressing both higher and lower level cognitive objectives, integrating one's teaching with teaching in other subject areas, accepting responsibility for student outcomes, thoughtfulness and reflection in practice (Porter & Brophy, 1988), utilizing appropriate learning assessments (Cashin, 1989), using role models and mentors, past related teaching experiences, strong work ethic (Silvestri, 2005), and instructor-group interaction (Baslow et al., 2006).

In addition to empirical research about teaching in the classroom, comprehensive resources about teaching have provided teaching strategies, techniques, approaches, and recommendations (Davis, 2001; Lowman, 1995; McKeachie & Svinicki, 2006; E. W. Taylor, 2006). The role and importance of teaching has been highlighted annually through the U.S. Professors of the Year awards (Council for the Advancement and Support of Education & The Carnegie Foundation for the Advancement of Teaching; Roth, 1997). Other research has focused on creating significant learning experiences within the classroom (Fink, 2003). One 15-year empirical study examined teaching practices of more than 100 of the best college professors

from 40 disciplines. The study focused on six broad questions: (1) what do the best teachers know and understand, (2) how do they prepare to teach, (3) what do they expect of their students, (4) what do they do when they teach, (5) how do they treat students, and (6) how do they check their progress and evaluate their efforts (Bain, 2004a, 2004b).

Research about teaching leadership

The scholarship regarding teaching leadership has included a wide spectrum of discussions. Early research included such topics as the role of faculty (Hashem, 1997), metaphors for teaching leadership theory (Burns, 2000), the use of syllabi (Watt, 1995, 1997), the use of journals (Dormody, 1996), possibility (Wren, 1994), preparation of students (Swatez, 1995), ethical considerations (Hackman, Olive, Guzman, & Brunson, 1999), online learning (Cini, 1999), grammar (Lewis, 1995), training (Welch, 2000), models for leadership education (Klenke, 1993), strategies, challenges, and recommendations for a diverse society (Hickman & Creighton-Zollar, 1997), the emergence of leadership studies (C. L. Brungardt, Gould, Moore, & Potts, 1998), and reviews of the research in leadership development and education (C. Brungardt, 1997). Some of the more recent research has focused on variations between leadership programs and departments and theory versus skill development (C. Brungardt et al., 2006), grounded theory (Eich, 2008; Komives, Owen, Longerbeam, Mainella, & Osteen, 2005; Osteen, 2003), teaching methods and retention of leadership knowledge (Williams & McClure, 2010), using a comprehensive leadership framework (Boyce, 2006), what scholarship and texts are being used when teaching leadership (Harris, Bruce, & Jones, 2011), and the professionalization of student learning practice (J. Arminio, Roberts, & Bonfiglio, 2009; Komives et al., 2011). However, to date, the research about teaching leadership has been focused in the classroom rather than in co-curricular undergraduate leadership programs.

The importance of teaching

A conversation about the importance of teaching has reemerged recently at the national level. The National Council on Teacher Quality and *U.S. News & World Report* announced in 2011 their intention to survey teacher-education programs in every state ("Tomorrow's teachers: Review of the nation's education schools," 2011). While the announcement sparked a serious debate in K-12 schools, it also reinforced the message that teaching matters. "Skillful teaching makes the difference between students' learning what they need to succeed or not, and it matters for all students, rich or poor, regardless of color" (Ball, 2011). Further emphasis was placed on improving teacher effectiveness when the Bill & Melinda Gates Foundation awarded $290 million to various school districts to develop new model personnel systems (Banchero, 2011).

What students do and learn in K-12 education does impact how they progress in a college or university setting. "What students came to college with largely explained how they developed in college. Eighteen or more years of experience provided a strong foundational grounding on which college experiences built" (Dugan & Komives, 2007). Despite the growth and rapid expansion of co-curricular leadership programs in higher education, very little research has been conducted about what good teachers do in these environments. These leadership programs and settings are unique because they are often multi-day, they are typically held off-campus, and students generally are not granted academic credit for participation. Given that the impact of what students are able to accomplish in college can depend on their K-12 experience and education, it has been recommended to higher education leadership educators to build bridges and serve as a catalyst in the leadership development process with K-12 educators (Dugan & Komives, 2007). If student leadership development in higher education is perceived as increasingly important (J. P. Freeman & Goldin, 2008), or as a mandate (McIntire, 1989), then it

is important to understand how teaching best happens in these co-curricular undergraduate college/university leadership programs.

Significance of this study

Despite recent growth in undergraduate leadership programs in U.S. higher education, there remains a void in the literature regarding what constitutes good teaching practice in co-curricular, undergraduate leadership education programs. This study will seek to address that void by examining effective teaching practices in one such type of program: multi-day, one-time leadership programs for college/university students that have been in existence for at least 10 years.

Past research has focused on many aspects of leadership development in higher education. These have included, but are not limited to: leadership theory, leadership models, outcomes, service learning, civic engagement, social identity models, professionalization of the student leadership educator, program evaluation, growth of leadership development programs, and even what aspect(s) in leadership should be taught. While much is known about good teaching in the traditional classroom settings, very little is understood regarding good teaching practice in outside-of-the-classroom, one-time, multi-day, co-curricular leadership programs for undergraduate collegians. This study addresses this problem by examining instructor practices in long-standing, co-curricular, multi-day, one-time, undergraduate, college and university leadership programs.

Purpose of this study and research questions

This study draws from the work of Ken Bain and his 15-year research study and book *What The Best College Professors Do* (Bain, 2004b). Bain (2004b) identified potential candidates (instructors) predominantly through interviews and recommendations from students

and professors. Although Bain (2004b) utilized several sources of information over the course of the 15-year study, such as syllabi, assignment sheets, statements of grading policy, lecture notes, observation, student academic work, and colleagues' comments, he ultimately employed formal and informal interviews with instructors themselves, as the primary source to identify what the best college professors do. Given that the data in Bain's (2004b) study primarily came from interviews, additional data collection in this study, beyond interviews, such as instructor manuals, materials, and observation, was ruled out so as not to create a perceived evaluation of each of the respective programs or to infringe on intellectual copyright of each program. It was therefore determined that interviews would serve as the primary method of inquiry, like Bain (2004b), in this study as well.

The primary research question guiding this study is: What do good teachers do in college/university multi-day, one-time, co-curricular leadership programs? Six sub questions, derived from Bain's (2004b) study, were asked of teachers indicated to be excellent:

1. What do good teachers know and understand?
2. How do good teachers prepare to teach?
3. What do good teachers expect of their students?
4. What do good teachers do when they teach?
5. How do good teachers treat students?
6. How do good teachers check their progress and evaluate their efforts?

By hearing from good instructors themselves, this study will provide data and insight about teaching to help colleges, universities, leadership educators, and organizations that provide multi-day, one-time, co-curricular undergraduate leadership programs. Furthermore, it will work to fill a gap in the literature that already has been addressed as lacking (Dalton & Crosby, 2008).

Impact of study

The results in this study will be useful for organizations in the selection, training, and evaluation of lead facilitators of co-curricular, multi-day, undergraduate college and university

leadership programs. Additionally, the results could be used by facilitators to self assess and become better at their craft.

Chapter 2

Literature review

Introduction

Undergraduate leadership education programs are on the rise across the United States and have expanded exponentially since the 1980s (Dugan & Komives, 2007; F. H. Freeman et al., 1996; Stoker, 2010). The National Clearinghouse for Leadership Programs lists more than 100 organizations and associations involved in leadership programs (National Clearinghouse for Leadership Programs, 2011a). As of the late 1990s, there were academic and co-curricular leadership programs on approximately 700 U.S. college and university campuses (Schwartz et al., 1998). Recent sources suggest that there are undergraduate leadership programs at more than 1,000 higher education college and universities (C. Brungardt et al., 2006; Komives et al., 2011; Scott, 2004).

Undergraduate leadership programs span a continuum of configurations and menu options. Colleges and universities long have provided the environment and programming for co-curricular leadership development. According to Stoker (2010):

> "Higher education has historically incorporated character development outside the classroom, although such aims were often implicit. A wide swath of character-forming experiences in the co-curriculum was supported by a study of Dartmouth alumni who reported being influenced in character during their college years by activities outside the classroom to a greater degree than through interactions with faculty or administrators (Lingley, 1931). One example that Lingley (1931) cited was the influence of fraternities in molding character of involved students" (p. 9).

A critical distinction exists between academic programs (those that occur inside the classroom) and co-curricular programs (those conducted outside the traditional classroom setting). Some of the recent growth in undergraduate leadership programs can be attributed to co-curricular

programs housed in student affairs and residence life (C. Brungardt et al., 2006), while some stem from academic courses, concentrations, and certificate programs (Riggio et al., 2003).

Co-curricular leadership programming happens in many different forms – from weekend retreats, to one-hour workshops, to week-long programs. Despite the massive growth and proliferation of leadership training in either academic classrooms or co-curricular settings, little is known about how leadership education is delivered effectively in either setting. The purpose of this study is to examine what effective instructors (commonly called facilitators) do in co-curricular, multi-day, one-time, undergraduate, college and university leadership programs.

Co-curricular undergraduate leadership education

Co-curricular undergraduate leadership programs (out-of-class experiences) have long been connected to the student affairs function within the academy. Stoker (2010) found that a series of statements defining the work of student affairs to support the academic mission and vision of colleges and universities has been developed during the course of 70 years. One of the first of these statements spoke to developing the whole student and supporting well-rounded education and experiences outside the classroom (American Council on Education, 1937, 1949). "These statements defined the administrative functions to support students in responsibilities that had been abandoned by faculty" (Stoker, 2010).

More recently, several documents have been published by various organizations and constituencies that not only blur the line of learning between academic and student affairs, but also go on to articulate the need to develop students in a more holistic way. The more prominent, circulated, and cited documents include *The Student Learning Imperative* (American College Personnel Association, 1994), *Principles of Good Practice in Student Affairs* (American College Personnel Association & National Association of Student Personnel Administrators,

1997), *Powerful partnerships: A shared responsibility for learning* (American Association for Higher Education, American College Personnel Association, & National Association of Student Personnel Administrators, 1998, June 2), *Learning Reconsidered* (Keeling, 2004), and *Learning Reconsidered 2* (Keeling, 2006). One researcher found that student learning occurs through intentional engagement outside the classroom, encouraging rich dialogue and purposeful programs (Shushok Jr. et al., 2009). Researchers also have found that successful learning environments for students are collaborative, involve all areas of the academy, and support holistic education (Kuh et al., 2005).

There are different institutional approaches to connecting leadership education and institutional principles. The type of institution, institutional values, and institutional mission and vision are factors that may influence the leadership education approach of a college or university. For example, faith-based institutions often are more explicit in stating their fundamental values and principles related to student development programming (Lau, 2005; Stoker, 2010). Some institutions utilize a code of ethics or honor code as a foundation of values-based programs (Matthews, 1999; McCabe & Treviño, 2002; Stoker, 2010). Other institutions focus on civic responsibility through community and service engagement (Cilente, 2011; Stoker, 2010; Thornton & Jaeger, 2006).

Leadership education efforts range widely from campus to campus. Leadership education may be focused on individuals – for example targeting either emerging leaders or students already in leadership roles – or on approaches, such as promoting civic engagement (Dean, 2006; Dugan & Komives, 2007; F. H. Freeman et al., 1996; National Clearinghouse for Leadership Programs, 2011b, 2011c; Stoker, 2010). Programs are coordinated from a wide

variety of offices including dedicated leadership centers (F. H. Freeman et al., 1996; National Clearinghouse for Leadership Programs, 2011b, 2011c; Stoker, 2010).

In *The Handbook for Student Leadership Development (2nd ed.)* (2011), an entire chapter is dedicated to co-curricular collaborations between student and academic affairs. *The Handbook* provides examples of areas in the academy that sponsor or administer undergraduate leadership programs. These areas include: (1) academic affairs, (2) athletics and recreation (e.g. campus recreation programs, intercollegiate athletics and club sports), (3) campus activities (e.g. fraternities and sororities, residence life), (4) student organizations, (5) community engagement, (6) cultural and social identity programs (e.g. dialogue programs, disability support programs, multicultural affairs and student centers,) (7) employment and professional preparation, (8) international education and study abroad, and (9) ROTC programs (Komives et al., 2011).

As stated previously, co-curricular undergraduate leadership programs take on many formats. *The Handbook for Student Leadership Development (2nd ed.)* suggests two main types of co-curricular programs: (1) one-time programs (e.g. conferences, retreats, workshops, lectures) and (2) sequential programs (e.g. workshop and program series, emerging leaders programs, co-curricular leadership certificate programs, global leadership programs, multi-year programs) (Komives et al., 2011). Stoker describes these types of co-curricular programs as "external approaches" by non-profit associations or organizations that are "residential learning institutes designed to foster community, develop individual leadership skills with an emphasis on values and diversity, and foster a sense of purpose to effect change back on the student's campus" (Stoker, 2010, pp. 18-19). This study focuses on one-time, long-standing, multi-day, co-curricular programs only.

Multi-day co-curricular undergraduate leadership programs

There are several co-curricular programs for undergraduate students in higher education. These programs are listed from the longest-standing and include LeaderShape®'s The LeaderShape® Institute, four from the North-American Interfraternity Conference's Undergraduate Interfraternity Institute (UIFI), three from the Association of College Unions International's I-LEAD® program, and four from Beta Theta Pi Fraternity's John and Nellie Wooden Institute for Men of Principle. A description of each is provided below.

LeaderShape®

LeaderShape®'s mission is "to transform the world by increasing the number of people who *lead with integrity*™ and a healthy disregard for the impossible" (LeaderShape, 2011, Curriculum Information, p. 1). LeaderShape®'s vision is "a just, caring, and thriving world where all *lead with integrity*™ and a healthy disregard for the impossible" (LeaderShape, 2011, Curriculum Information, p. 1). LeaderShape®'s (2011) definition of leadership states that:

> "Leadership involves living in a state of ***possibility***, making a commitment to a ***vision***, developing ***relationships*** to move the vision into action, and sustaining a high level of ***integrity***. Effective leadership takes place in the context of a ***community*** and results in ***positive change***" (p. 1).

The organization's definition of leadership further states that:

> "Leadership is not positional and does not require formal authority or personal charisma. Every person in the world has the capacity to effectively lead with integrity, and this capacity can be developed in all people who are committed to doing so. One's capacity to *lead with integrity* can be developed over time through disciplined practice. A commitment to the discipline of leadership development is a lifetime journey" (p. 1)

LeaderShape®'s flagship program, The LeaderShape® Institute, celebrated 26 years in 2012. The LeaderShape® Institute was evaluated critically and named as one of the exemplary programs of 31 studied in the groundbreaking research provided by the W.K. Kellogg Foundation's *Leadership in the making: Impact and insights from leadership development programs in U.S. colleges and universities* (Zimmerman-Oster & Burkhardt, 1999a, 1999b). The

evaluation of The LeaderShape® Institute was extensive and included qualitative and quantitative data collection that consisted of pre-tests, post-tests, and follow-up surveys. The Kellogg report states:

> "The results of this longitudinal research revealed that LeaderShape® was successful in increasing the ability of college leaders to create organizational visions. It also increased their general transformational leadership skills. The participants rated their overall experience with LeaderShape® very positively. They perceived their leadership skills and abilities as being improved because of the training they received" (Zimmerman-Oster & Burkhardt, 1999b, p. 11).

The report states that LeaderShape®'s perspective and approach on leadership and vision is consistent "with Burn's notion/theory of 'transforming leadership,' and with the writings of other leadership theorists such as Greenleaf, Bennis, Nanus, Senge, and Gardner" (Zimmerman-Oster & Burkhardt, 1999b, p. 35). Lastly, the report highlights The LeaderShape® Institute by saying, "to date, it has produced extraordinary results in the program's participants" (Zimmerman-Oster & Burkhardt, 1999b, p. 35).

LeaderShape® has seven stated learning outcomes for The LeaderShape® Institute. These outcomes are: (1) commit to identifying the core ethical and personal values and then commit to act on them, (2) identify when behavior is not in congruence with core ethical and personal values, (3) develop relationships where the dignity and contributions of all people are acknowledged and respected, (4) create a vision for the greater good of a community which includes a "healthy disregard for the impossible", (5) develop skills to be able to successfully work in groups and teams to accomplish a collective vision, (6) articulate action steps necessary to implement a vision, and (7) increase their capability to produce extraordinary results (LeaderShape, 2011, Curriculum Information, p. 4).

Stoker's (2010) dissertation studied the long-term, lasting, and longitudinal impact of attending a LeaderShape® program. Highlights of his findings revealed more than 95% of

respondents stated that LeaderShape® was one of the meaningful experiences identified, 89% said the program shaped or effected their leadership styles, and 94% of respondents felt confident and capable to *lead with integrity* as a result of their participation (Stoker, 2010).

Stoker's (2010) results show that students who attended have a strong confidence in their current abilities and that these abilities were further developed as a result of LeaderShape®'s outcomes for The LeaderShape® Institute. Stoker was surprised by past participants being able to specifically name portions and experiences of the curriculum as key to their learning. In addition, his results show evidence that participant's memories last for years after their participation in the program. "Based upon the data, LeaderShape® could be characterized as an emotionally charged, positive growth experience that develops a lasting effect on program graduates by developing strong connections, enhancing personal values, and developing a commitment for leaders to influence positive change" (Stoker, 2010, p. 78).

Stoker's (2010) findings speak to the powerful impact possible with co-curricular undergraduate leadership programs. He speaks to this by saying:

> "This study demonstrates that learning can occur within a program outside of a traditional higher education classroom setting, with positive memories of the experience enhancing the application of the material and intended outcomes years after attendance. Several factors that the LeaderShape® experience included may be replicated with other programs or learning environments to achieve similar long-term results. The learning environment, both the physical location and surroundings, in addition to the atmosphere generated by the program, facilitators, and other attendees, all contribute to any potentially lasting effects. Components of the curriculum designed to elicit an emotional response or encourage strong personal reflection and exploration may also contribute to possible lasting effects" (Stoker, 2010, p. 85).

Several participants spoke about how the program enabled them to explore their own values and development. This values clarification specifically was named as important to past participants; the experience clearly influenced their leadership style and current practices. Past participants were able to identify confidence or ability to act with the programs' stated outcomes. Stoker

(2010) found, based on the data, that students believe they have aligned their daily actions with their personal values, act consistently with their core values, and recognize when their behaviors are not congruent thus resulting in and demonstrating leadership with integrity. In addition, students responded to the positive environment of the program as one that enabled personal exploration and learning to occur as well as retained and utilized well after participation in The LeaderShape® Institute.

Stoker (2010) reported that the quantitative questions resulted in strong responses, with 17 of the 21 scaled questions showing more than 90% positive results. He found that "the data show that LeaderShape® continues to be a meaningful experience for the respondents and they continue to identify abilities and behaviors consistent with the LeaderShape® outcomes. The qualitative results demonstrated strong social connections facilitated by the environment and atmosphere, personal effects regarding values and leadership style, and continuing memory of specific curricular components most often due to emotional or personal affect" (Stoker, 2010, p. iii). Stoker (2010) stated:

> "Based upon the data, LeaderShape® could be characterized as an emotionally charged, positive growth experience that develops a lasting effect on program graduates by developing strong connections, enhancing personal values, and developing a commitment for leaders to influence positive change. The research demonstrates that program graduates identify, apply, and retain curricular components that enhance their personal development years after attendance with an adequate amount of time for discussion, reflection, and social interaction at the experience" (Stoker, 2010, pp. iii-iv).

Stoker (2010) spoke to the significant social impact component of the curriculum and its effects on participants. Because of the opportunity for individual processing, feedback, and group reflection, participants made personal connections with the material. In addition, activities challenged students out of their comfort zones and stretched their perceptions and beliefs. Stoker believes that the cumulative impact in and on participants justifies sending students to the

program. Evidence also supports graduates leading with integrity and impacting their personal and professional lives – reaching well beyond just their participation during the program. While positive memories and connections were expected, Stoker did not expect the strong responses so many years after their participation. Stoker summarized his findings by stating:

> "Among people who value LeaderShape® the effects seem to be long standing. Program graduates of LeaderShape® who attended a national session five or more years prior to the assessment demonstrate a lasting effect on their personal lives and leadership styles, directly linking such effects to their LeaderShape® attendance and experiences. Responses were consistent over the time since attendance, demonstrating strength of the program by delivering a consistent message that has resonated over time with individuals. This study demonstrates that lasting effects occur from an emotionally charged, growth experience delivered in a one-week format with attention to the environment and atmosphere, facilitating personal development, and designing curriculum components that elicit strong responses. LeaderShape® graduates responding to this study further demonstrate that specific information or knowledge is retained over time and utilized, supporting the idea that learning in the short term can have lasting effects over time" (Stoker, 2010, p. 88).

This supports the research also done by the Multi-Institutional Study of Leadership (MSL) (2007). In the MSL, a total of 135 students indicated they had attended the LeaderShape® Institute. These participants came from random samples at four different institutions. Two of the institutions were private colleges and two were public (Dugan, 2007). This data was compiled by John Dugan who serves as one of the principle investigators of the Spring 2006 MSL that includes findings from more than 50,000 students across 52 campuses (Dugan & Komives, 2007). The Social Change Model of Leadership Development was provided as the theoretical framework for the MSL (Dugan & Komives, 2007). The MSL was created specifically for college students and has been shown to be consistent with the emerging leadership paradigm.

LeaderShape® worked with the principal investigators to add whether or not students had participated in The LeaderShape® Institute into the MSL. Dugan (2007) compiled an

independent report for LeaderShape® that provides data regarding the individuals who self-identified as participants in The LeaderShape® Institute. Dugan & Komives (2007) found that the scores of graduates of The LeaderShape® Institute were different from National norm scores, and had a significant positive difference of six of the seven of the critical values of the Social Change Model with an N = 135. In addition, graduates from The LeaderShape® Institute had a significantly higher levels of leadership efficacy when compared to the national norm (Dugan, 2007).

Other long-standing, multi-day, co-curricular undergraduate leadership programs

While The LeaderShape® Institute provides the largest number of institutes and graduates, there are other, similar programs being conducted in a co-curricular, institute format, in higher education. The programs that have been held the longest and are arguably the most well-known are now explained in greater detail.

North-American Interfraternity Conference's Undergraduate Interfraternity Institute (UIFI)

"UIFI is a five day institute that brings together fraternity men and sorority women from across North America to create opportunities to explore, define, and enhance their leadership skills, personal awareness, commitment to their fraternity or sorority, and grow to expect values based action from themselves and those they lead" (North-American Interfraternity Conference, 2011). The North-American Interfraternity Conference (NIC) goes on to describe UIFI by stating, "the institute is interactive, fun, challenging, and intentional. During a session, you'll experience hands-on interaction, experiential activities, discussion time, and personal reflection time" (North-American Interfraternity Conference, 2011). While attending, participants develop a personal action plan to undertake within their organization following UIFI.

The only published research about UIFI is a master's thesis, conducted in 1997, that focuses on learning outcomes and student perceptions of the most important leadership skills needed versus most frequently used since their attendance (Maxwell, 1998). The thesis was a qualitative study focused on how students applied what they learned on their respective campuses after attending. While the curriculum has changed since the time of this study, Maxwell found the skills cited as most important by the respondents, in order of importance, were: (1) confrontation, (2) communication, (3) ritual/values, (4) leadership, and (5) teamwork/unity. The skills cited as most used by the respondents, in order of importance, were: (1) confrontation, (2) ritual/values, (3) encouraging the heart, (4) self-esteem, and (5) leadership/delegation (Maxwell, 1998).

Association of College Unions International's I-LEAD® program

"The Institute for Leadership Education and Development (I-LEAD®) is ACUI's premier student program, designed to emphasize the key concept areas of leadership, community development, and change. I-LEAD® offers an opportunity for college students to focus on personal growth and other issues facing our world. The institute prepares students to develop skills that will serve them as leaders in any situation, regardless of role, organization, or environment" (Assocation of College Unions International, 2011b). "Since becoming a stand-alone institute in 1999, more than 900 students and 200 facilitation team members have participated in the I-LEAD® program" (Rudisille, 2011, September 26).

Similarly to UIFI, at this time of this study, there is only one known published research article regarding the ACUI's I-LEAD® program (Rudisille, 2011, April 19). The article discusses the program's format, curriculum, theoretical foundations, outcomes, and program administration (Rudisille & Violett, 2011). I-LEAD® began in 1994, as a four-day institute in

conjunction with ACUI's annual conference proceedings. In 1999, the program became free-standing (Assocation of College Unions International, 2011a). ACUI's decision to separate the program from the conference "was to make the program an immersion experience, as its intensity and community-building was enhanced by removing the distractions that easily existed within a conference atmosphere" (Rudisille & Violett, 2011, p. 5). The program is now five days in length. ACUI has had a total of 21 sessions of I-LEAD® since its founding in 1994.

Reflection was cited as a key component to the participants' I-LEAD® experience – both with peers and facilitators. Participants elaborated that small-group activities added to their learning as well as personal and action-oriented activities, which included group development, teambuilding, values, and self-awareness (Rudisille & Violett, 2011).

Beta Theta Pi Fraternity's John and Nellie Wooden Institute for Men of Principle

Beta Theta Pi Fraternity's John and Nellie Wooden Institute for Men of Principle was held first in 1999. According to the Beta Theta Pi fraternity website, "The award-winning John and Nellie Wooden Institute for Men of Principle is an incredible opportunity for initiated Betas that focuses on the ritual of Beta Theta Pi and becoming a better leader. The Wooden Institute allows Betas to interact with brothers and Friends of Beta from across North America. Participants share ideas, dissect Fraternity ritual, partake in challenging activities that focus on leadership skills, learn more about the history of Beta Theta Pi and reflect on the Fraternity's heritage" (Beta Theta Pi Fraternity, 2011b). The structure of the Wooden Institute is "intentionally designed to build upon one another and therefore, require that everyone experience the same curriculum. Unlike a conference, the sessions are not 'pick and choose' and everyone is expected to participate in every session" (Vadnais, 2011, August 25).

The Institute incorporates active learning, various participant learning styles, and utilizes large group discussions along with small groups, called chapters, with 10-12 participants in each chapter. The four major curriculum themes include leadership, values/principles, brutal facts, and change. When describing leadership, the program states, "This is a leadership institute. Leadership requires self-awareness about how you lead, how you are perceived and what strategies/resources are available to bring about positive change" (Beta Theta Pi Fraternity, 2011a, pp. 2-4). With regard to values/principles, the curriculum states, "You will be challenged to think, learn about and apply the principles of Beta to how you approach this experience, to your leadership and to your chapter." Brutal facts are explained as, "The Wooden Institute will challenge you to confront the brutal facts within your chapter and community." Lastly, efforts around change in the program are described, "The culmination of the experience here will be for you to develop a "Change Initiative" – what you will have the courage to fight for or against – what you will change in your chapter/community" (Beta Theta Pi Fraternity, 2011a, pp. 2-4). In sum, the Wooden Institute curriculum states, "This experience is designed to give you the knowledge, resources and ability to lead with integrity which will ultimately lead to a stronger chapter."

While still limited in number, more empirical research studies have been conducted on the Wooden Institute than UIFI and I-LEAD®. A dissertation about the Wooden Institute employed longitudinal analysis to determine the impact of this leadership education program on six student attendees (DiPaolo, 2004, 2008, 2010). DiPaolo conducted a qualitative research study that dove into the complexities, challenges, difficulties and psyches of the experiences of these men, by interviewing them on multiple occasions during the course of nearly two years (12 and 21 months) following their participation (DiPaolo, 2004, 2010). Two major themes emerged

regarding the impact of the program on participants: (1) leadership is done on and by a team, and (2) leadership is done best when the actions of the leader are rooted in a core belief system (DiPaolo, 2002). DiPaolo went on to state:

> "Every participant spoke at length about not leading alone after they had completed the program. The concept of transformational leadership was quite evident in that all had a new realization that the act of leading must edify the leader, the follower, and the organization. In order to do this, a respectful relationship built on good communication and mutual trust must exist first. Every participant in some way related that The Institute gave them an opportunity to clarify what their deeply-held values are and that a leader must lead with integrity to those values. Each of the six men left feeling more confident in themselves as a leader because their actions as leaders would now be grounded in something that could not be shaken by fad or resistance." (p. 75)

Additional research regarding the Wooden Institute examined the program's impact on participants individual outcomes (Biddix & Underwood, 2010; Bureau, 2010). Biddix and Underwood (2010) conducted a longitudinal analysis of outcomes assessment over a span of ten years involving 2,065 participants. Results from the research indicated that 62.7% of the attendees became officers or volunteers following their participation in the program and 8% of attendees became donors (Biddix & Underwood, 2010). Of the attendees who became involved, 46.5% of participants became executive officers within their organization and becoming chapter president was the most common role (Biddix & Underwood, 2010). The researchers went on to question "…were vast majority of attendees intending to become leaders regardless (see Astin, 1993; Pascarella & Terenzini, 2005), or did the Program influence their decisions to run for office (Komives, Longerbeam, Owen, Mainella, & Osteen, 2006)" (Biddix & Underwood, 2010, p. 18). Biddix & Underwood (2010) found that the majority of the fraternity's evaluation efforts had primarily focused on satisfaction surveys following the program, but they provided recommendations of developing an internal instrument or utilizing an existing instrument such as the Socially Responsible Leadership Scale (SRLS) (Tyree, 1998).

Leadership education

The interconnected web of teaching and learning in the academy is an ongoing conversation. Authors such as Margaret Wheatley and Parker Palmer speak about this web, often in an organic way. Palmer is quoted as saying, "we teach who we are" (Palmer, 2007). Teachers must take care of themselves in the volatile environment of higher education. Robertson may have described it best when he referred to teachers as the parents and said, "…just as in an airline emergency, the parent needs to put on the oxygen mask before the children in order to optimize the chances that the children will be cared for" (Robertson, 2005, p. 191). Anding (2005) interviewed Robert E. Quinn regarding transformational teaching where Quinn stated:

> "The opportunity to teach is an opportunity to impact people in ways that will shape the world. I think we can try to inform our students, or we can try to transform them. Our ability to do that is a function of whether we are in the fundamental state of leadership. If we get into the fundamental state of leadership, our work will tend to become our calling." (p. 495)

The discussion and debate about how "real" learning happens on campus – in or outside of the classroom, and via faculty or student affairs administrators – is a topic of conversation in higher education. Wenger (2006) says school is not the privileged locus of learning. He describes learning as not being a self-contained, closed world where knowledge is to be applied on the outside. Rather, "it is life itself that is the main learning event" (Wenger, 2006, June).

Teachers themselves often are conflicted and torn. Parker Palmer (1992) spoke about faculty being divided by those who want to reform teaching and learning in the academy but are often frustrated by the low status of teaching in the academy, challenged with tenure decisions that favor faculty who publish, disappointed with how scarce dollars were always go toward

research, and the litany of impediments for institutional reform. Palmer, who authored *Divided No More*, encouraged faculty to come to teaching and their own defense by saying:

> "The movement will persist until the obvious is acknowledged: Teaching has as much right to full status in the academy as any other academic function – research, athletics, administration, lobbying, fund-raising – and it may have even more right than some! Teaching simply belongs in the academy, and there is no need to defend that claim" (Palmer, 1992).

Rendon (2000) talks about the need for integration just like pieces needed to complete a puzzle and that validation of teaching and learning for both in- and out-of-class environments must be created and fostered. In her article, *Academies of the heart*, she describes five features that are needed in higher education. They are: (1) to create a learning environment that engages the heart as well as the intellect, (2) to make teaching and learning a relationship-centered process, (3) to honor and respect diverse ways of knowing, (4) to attend to matters of difference, as well as togetherness, and (5) to engage in contemplative practice (Rendon, 2000). She goes on to say, "I am now understanding of how life is a paradox: To receive, we must give; to love others, we must love ourselves; to teach, we must be open to learning" (Rendon, 2000, p. 5).

Kuh (2008) raises the question of whether higher education is providing students with "realistic opportunities to actually develop the kinds of learning they need." Kuh states that excellent education has had core elements in every era that include the development of intellectual powers and capacities, ethical and civic preparation, and personal growth and self-direction. He challenges that if the academy is attempting to provide a liberal arts education, these aims and learning outcomes must include broad knowledge, strong intellectual skills, and a grounded sense of ethical and civic responsibility – especially if "its self-imposed 'nonvocational' identity and its recent insistence on learning 'for its own sake' rather than for its value in real-world contexts" (Kuh, 2008, p. 3).

The Liberal Education and America's Promise (LEAP), a decade-long national initiative undertaken by the Association of American Colleges and Universities (AAC&U), was developed to align the goals of college learning with the new global economy. Their findings, authored by Kuh (2008), were:

> "Informed by vigorous faculty and campus dialogue across the nation, the LEAP vision for student learning places strong emphasis on global and intercultural learning, technological sophistication, collaborative problem-solving, transferable skills, and real-world applications-both civic and job-related. In all these emphases, LEAP repositions liberal education, no longer as just an option for the fortunate few, but rather as the most practical and powerful preparation for 'success' in all its meanings: economic, societal, civic, and personal." (p. 3)

Four main overarching goals were developed that connected essential learning outcomes with high-impact practices with the goal of students' achieving a liberal education. These four goals were: (1) fostering broad knowledge of human cultures and the natural world, (2) strengthening intellectual and practical skills, (3) deepening personal and social responsibility, and (4) practicing integrative and applied learning (Kuh, 2008).

Stoker (2010) suggests that undergraduate leadership education is akin to character education programs. He states, "to be effective with a character education program, the facilitator needs to be prepared with several approaches and theories in order to help each student connect to the material" (p. 10). Effective character education programs must be directly related to the institutional outcomes, values, and mission (Berkowitz & Fekula, 1999). Additionally, Berkowitz & Fekula (1999) suggest that the design of character education programming must be broad and comprehensive across campus involving all disciplines of study. Given the diversity of educational levels involved in character education, it is suggested that there should be numerous delivery methods (Berkowitz & Fekula, 1999; Lickona, 1997). If character is to be effectively taught, faculty members must be role models for students (Tead, 1964).

Character education, cooperative learning, and critical thinking all have been linked to leadership education. Character often has been associated with democratic principles when individuals act with ethical and moral decision-making and demonstrate a sense of responsibility to lead and act for the greater good of others (Berkowitz, 1998, September; Colby, Ehrlich, Beaumont, & Stephens, 2003; Lickona, 1997; Power, 1997, March). Cooper (1995) cites Astin as calling for cooperative learning in undergraduate curriculum to be used as a vehicle for fostering the development of liberal education. Halpern (1999) states that if critical thinking is a goal of education, then higher education must help students improve their skills and abilities to think critically. "It is not enough to teach college students the skills of critical thinking if they are not inclined to use them" (Halpern, 1999, p. 72). Colby et al., (2003) found that educational programs that focus on character expand the individual's lens to involve the community. He also states that character education programs serve society and develop citizens with the intent of contributing to others.

Watt (1997) argues that leadership is essentially a matter of human relationships. To be effective, he says, relationships are fundamental frameworks in networks, norms, social trust, and social organizations where coordination and cooperation is for mutual benefit. Collaborative leaders are needed particularly if groups are to be successful in achieving goals, solving problems, created shared visions, and developing strategies (Watt, 1997). Watt (1997) goes on to articulate that collaboration is required in order to change organizations, communities, and society where "leaders must empower, not control." In order for this to happen, Watt cites Rost's account that leadership educators must "see new models for training and development" and "paradigms of the past are no longer sufficient to develop leaders and collaborators for the next century" (Watt, 1997).

Two paradigms have been contrasted – the instructional paradigm and the learning paradigm – about how teaching and learning has occurred in higher education over the course of thirty years (DeZure & Marchese, 2000). "Those who conceptualize teaching as transferring information see the teacher as pivotal. Those who conceptualize teaching as knowledge construction focus on student learning. Two models of teaching emerge: instruction and construction" (Carnell, 2007, p. 27). Carnell (2007) found four approaches to teaching and learning:

Table 2

Four approaches to teaching and learning.*

	Purpose of teaching	Teaching approach	Roles of teacher & learner
Didactic	Increasing information	Transmitting information	Teacher is expert; learner passive
Empowering	Development of individual understanding	Providing experiences that encourage	Teacher is facilitator; learner active in the development of understanding
Cooperative	Group working together to examine existing knowledge	Setting tasks with defined parameters	Teacher decides parameters; learner contributes to group tasks
Community	Collective knowledge construction	Learning through co-constructive dialogue	Teacher and learners have joint responsibility for learning

* Carnell, E. (2007). Conceptions of effective teaching in higher education: Extending the boundaries. *Teaching in Higher Education*, 12(1), 25-40, p. 36.

DeZure & Marchese (2000) compared mission and purposes, criteria for success, teaching/learning structures, learning theory, productivity/funding, and the nature of roles. With the emerging learning paradigm, holistic education is emphasized where all staff is considered educators who produce student learning and success. An ongoing debate about what role the teacher should play and what role the learner should play – and whom has what responsibility for

what – often divides individuals, faculty members, student affairs administrators, departments and academic units from a pedagogical point of view. Each faction is deeply rooted in tradition, past experiences, and culture that can create a barrier to change as new paradigms and research about learning and teaching emerge. This very debate begs questions regarding politics, funding, and the very design of how instruction and teaching occurs in the academy because "colleges have created complex structures to provide for the activity of teaching conceived primarily as delivering 50-minute lectures" and that "the mission of a college is to deliver instruction" (DeZure & Marchese, 2000).

"Teaching theory is usually prerequisite to the learning of effective leadership skills, but is insufficient" (Lewis, 1995, p. 8). Lewis argues that you cannot teach leaders to be transformational and you should not even try with traditional methods and curricula. Ultimately, leadership potential can be enhanced, but transformational leadership cannot be learned when individuals cannot practice it (Lewis, 1995). Citing Conger, Lewis states that "to improve actual practice, leadership educators should develop and refine teachable skills, improve conceptual abilities, and provide feedback to learners (Conger, 1992)" (Lewis, 1995, p. 7).

Palmer (2007) acknowledges, "my focus on the teacher may seem passé to people who believe that education will never be reformed until we stop worrying about teaching and focus on learning instead" (p. 6). He does not dispute that the focus and goal is for students to learn, rather than for professors to perform. Palmer also does not argue that students can learn in a wide variety and diverse ways, including bypassing the teacher and the classroom. He is clear that in classrooms – where most students receive their formal education – teachers possess great power to create conditions that help or hinder learning. Good teaching involves and requires teachers to intentionally act, create, and understand conditions where students can learn best

(Palmer, 2007). Palmer's evidence about good teaching comes from years of compiling students' stories about their teachers. While individual style, technique, and approach may vary widely among good teachers, the one thing good teachers have in common is a strong sense of personal identity that infuses their work.

As previously discussed, Kuh's (2008) research and work with the decade-long Liberal Education and America's Promise (LEAP) launched by the Association of American Colleges and Universities (AAC&U) developed goals for college learning based on students' needs in a new global century. This resulted in an outline of high-impact educational activities with student learning outcomes that both educators and employers could endorse. These "teaching and learning practices have been widely tested and have been shown to be beneficial for college students from many backgrounds" (Kuh, 2008, p. 9). Of the high-impact practices that were developed, at least four connect to the goals and outcomes of long-standing, multi-day, co-curricular undergraduate leadership programs. These include, but are not limited to: common intellectual experiences, learning communities, diversity/global learning, and capstone courses and projects. Kuh (2008) stated:

> "Institutional leaders may protest nonetheless that the practices recommended in these pages are labor-intensive and therefore costly. But concerns about cost need to be set in a larger context. We live in a demanding, increasingly competitive global environment. The quality of citizens' learning has become our most important societal resource. If students leave college without the preparation they need for this complex and volatile world, the long-term cost to them – and to our society – will be cumulative and ultimately devastating.
> Conversely, if these high-impact practices support both student persistence *and* heightened achievement on essential learning outcomes, then wise leaders will find both the will and the wallet to make them a top priority. With so much at stake, how can we not?" (p. 8)

Kuh asked a simple question: What is it about these high-impact activities that appear to be so effective with students? He found six common denominators among these high-impact

educational practices. First, these practices typically demand a considerable amount of time and effort on task by students. Second, the activities essentially demand that students are put in circumstances in which they must interact with peers and faculty about substantive matters, typically during an extended period of time. Third, when students participate in these activities it increases the likelihood that they will experience diversity through contact with others who are different from themselves. Fourth, regardless of the settings or structures, students get frequent feedback about their performance. Fifth, students see how what they are learning works in different settings – both on and off campus. And lastly, their participation in these activities can be life changing (Kuh, 2008).

Kuh (2008) found that by participating in these high-impact activities, students deepen their learning and become more aware of their own values and beliefs. Thus, students understand themselves better in relation to others to the world. Kuh found that students then gain intellectual tools and an ethical footing to act with confidence for the betterment of society. While it is ideal that activities would be available to every student every year, he recommends that institutions make it possible for students to attend at least two of the described, high-impact activities during the course of their undergraduate experience. Kuh (2008) cautions though "to engage students at high levels, these practices must be done well" (p. 20).

Research about teaching in the classroom

Substantial time and research has been devoted to the study of effective teaching. Horace Mann wrote about the "art" of teaching in 1840 (Zull, 2002). There are good reasons for this research. Knowledge is a cornerstone upon which our society is built. Dewey refers to the art of teaching when he "refers to the teacher as a guide and a director, comparing her to a navigator or

helmsman" (Waterson, 2011, p. 1). From Waterson (2011) we know that Dewey reminds us that students do not live in school and that education's focus should be on the activities of life.

Bottom line, "good teaching comes from good people" (Palmer, 2007, p. 13). The transfer of this knowledge can come in many forms, but much of the accepted and funded ways this knowledge is transferred is through teaching and formal educational institutions. Cranton described the challenge well by stating that knowing how to teach a subject area is different from knowing the subject area (Cranton, 2002). Ideally, "optimal teaching and learning occur when teaching styles align with learning styles" (Proserpio & Gioia, 2007, p. 69).

"The critical characteristics of effective teaching have been identified in the more than 10,000 studies on teaching effectiveness published in the last 20 years. Those studies are in general agreement" (Seldin, 2000). A listing of researchers and their lists of characteristics of effective instructors are presented in Appendix A. There is a common core of characteristics across these many researchers and their lists. These common core characteristics are illustrated in Table 3 below. The core appears to include being well organized, incorporating expert presentation/delivery, having mastery of content/knowledge, being student-centered, having care and compassion, having passion and enthusiasm, providing fair/timely feedback, being available to students, having a good course design, providing a conducive learning environment, and clearly and effectively communicating.

Table 3

Summary of Characteristics of Effective Teachers in Traditional Classroom Settings.*

	Porter (1988)	Cashin (1989)	Feldman (1989)	Carson (1996)	Hativa (2001)	Silvestri (2005)	Baslow (2006)
Well Organized	X	X	X		X	X	X
Expert Presentation/ Delivery	X	X	X	X		X	
Master of Content/ Knowledge	X	X	X			X	X
Student-Centered	X			X	X	X	X
Care & Compassion			X	X	X	X	
Passion/ Enthusiasm			X		X	X	X
Availability to Students		X	X	X			X
Fair/Timely Feedback	X	X	X		X		
Good Course Design		X			X	X	
Conducive Learning Environment			X		X		
Clarity & Effective Communication	X		X				

* McRee, M. A. (2010). *Student perceptions of effective instructor's behaviors/characteristics when learning in non-traditional (co-curricular) college and university leadership programs.* (Early Research Project), University of Illinois, Urbana-Champaign, IL.

It is important to note how these common characteristics were identified in each of the abovementioned studies. The majority of the research utilized student ratings as the primary source of information (Baslow et al., 2006; Carson, 1996; Cashin, 1988, 1989; Feldman, 1989a,

1989b; Hativa et al., 2001). The next most common use of data collection in the research was through teacher′s themselves (Feldman, 1989b; Hativa et al., 2001; Porter & Brophy, 1988; Silvestri, 2005). Lastly, other methods of data collection included videotaping (Hativa et al., 2001) and data from colleagues, administrators, and observers (Feldman, 1989b).

Chism (2006) found that:

> "When one looks at how excellence in teaching has been studied, several methods are listed: observation or interviews of teachers generally thought to be excellent or whose teaching evaluations by students or peers is high (Lowman, 1996); factor analysis of student ratings of instruction (Cashin, 1990; Feldman, 1996); content analysis of letters of nomination for awards (Donaldson, 1988; Lowman, 1994); review of the literature or expert opinion (Chickering & Gamson, 1989; Elton, 1998; McAlpine & Harris, 2001; Ramsden Margetson, Martin, & Clarke, 1995); student or faculty opinion surveys (Lowman, 1994); or multiple methods (Lowman, 1996; Pritchard, Watson, Kelly, & Paquin, 1998). The lists of characteristics of excellent teaching that emerges from these various studies do show a high degree of consistency." (p. 602).

Chism found three common denominators about teacher qualities from surveys, summaries of the literature, theoretical arguments about learning, and statistically-identified factors to be organization, communication, and fairness (Chism, 2006). The five additional factors she found that were commonly associated with excellence in teaching were rapport, clarity, enthusiasm, flexibility, and assigned workload. More on how effective teaching has been assessed comes later in this chapter.

Influence of teaching approaches

Five qualitatively different approaches to teaching also have been shown to influence student outcomes, whereas previous research mostly has been focused on students' perceptions of the quality of teaching (Trigwell, Prosser, & Waterhouse, 1999). Instructors that take a student-focused approach to good teaching are more likely to be coupled with higher quality learning outcomes (Trigwell et al., 1999). The researchers state:

> "…when teachers report that they have the student as the focus of their activities, where it matters more to them what the student is doing and learning than what the teacher is doing or covering, where the teacher is one who encourages self directed learning, who makes time (in formal 'teaching' time) for students to interact and to discuss the problem they encounter, where the teacher assesses to reveal conceptual change, where the teacher provokes debate, uses a lot of time to question students' ideas and to develop a 'conversation' with students in lectures, then their students are less likely to be adopting a surface approach" (Trigwell et al., 1999, pp. 66-67).

Mann supports this claim by calling for radically different pedagogies of teaching and goes on to elaborate by saying "…the 'secret of good teaching', is to produce a pedagogical environment that will maximize the chances that students will use a deep approach to learning and minimize the chances that they will use a surface approach" (Mann, 2001, p. 656). Mann (2001) furthers his argument for deep learning by citing Anne Brockback and Ian McGill in *In Facilitating Reflective Learning in Higher Education*, where deep learning will be required along with critical reflection to produce transformative agents that can cope with a rapidly changing world.

Instructors are recognizing that knowing about learning can significantly improve teaching (Svinicki, 1999). Traditional, discipline-based instruction does not necessarily produce better thinking (Halpern, 1999). Cranton identified seven facets that help to create a learning environment conducive to transformation: (1) an activating event that typically exposes a discrepancy between what a person has always assumed to be true and what has just been experienced, heard, or read, (2) articulating assumptions, that is, recognizing underlying assumptions that have been uncritically assimilated and are largely unconscious, (3) critical self-reflection or questioning and examining assumptions in terms of where they came from, the consequences of holding them, and why they are important, (4) being open to alternative viewpoints, (5) engaging in discourse, where evidence is weighed, arguments assessed, alternative perspectives explored, and knowledge constructed by consensus, (6) revising

assumptions and perspectives to make them more open and better justified, and (7) acting on revisions, behaving, talking, and thinking in a way that is congruent with transformed assumptions or perspectives (Cranton, 2002). While Cranton describes that there are no particular teaching methods that ensure transformative learning, challenging one's beliefs, assumptions, and perspectives must be combined with safety, support, and empowerment.

Ray (2004) identifies from research that learning is demonstrated "when students are actively engaged, have opportunities for interaction with others, are presented with challenging situations or questions that require critical thinking skills, and are surrounded by a nurturing learning environment" (p. 58). Teachers who exhibit different styles require different skills. For example, Robertson (2005) describes different styles in teaching and learning. He associates effective experiential education with sensitivity, empathy, and devotion to participants' individual and group processes and, in contrast, he associates good lecturing while in charge, in control, and providing structure and direction.

Learning styles of students have been difficult to quantify and categorize. One report found a lack of consensus to develop a single set of accepted principles about learning styles (Middle States Commission on Higher Education, 2008). At least six models were proposed including: (1) field dependence/field independence models (e.g. group embedded figures test), (2) Jungian models (e.g. Myers-Briggs, Keirsey Temperament Sorter, Kolb Learning Style), (3) sensory models (e.g. visual, auditory, kinesthetic), (4) social interaction models (e.g. learning preference scales), (5) multiple intelligence models (e.g. Howard Gardner), and (6) approaches to learning (e.g. John Biggs). Faculty should understand that students use a variety of approaches to learning that may not match their own (Middle States Commission on Higher Education, 2008). The report went on to state, "Vincent and Ross (2001) note that most professional

educators ‘agree that learning styles exist and acknowledge the significant effect that learning styles have on the learning process.’ The concept of learning styles makes sense intuitively.”

Teacher training was among the first applications of communities of practice (Wenger, 2006, June) and provided a vehicle where discussion, collaboration, and learning could take place without regard to academic discipline and hierarchy. Wenger (2006) said that in creating communities of practice among faculty, individuals were not limited by formal structure and could create connections among peers that span across organizational and geographic boundaries. He went on to describe a wave of interest in peer-to-peer professional development in education as one in which learning was not just a means to an end, but rather the end product itself.

Proserpieo & Gioia (2007) focus on how teaching best happens with a generation that has grown up with technology. Students who come from a culture that emphasizes immediacy, curiosity, and intellectual openness expect a rich, interactive, and playful learning environment. They found three features that have implications for teaching associated with effective learning for what they deemed the virtual generation. They are active involvement by students in the learning process, facilitative social settings, and problem-solving focus (Proserpio & Gioia, 2007). They state that a blended combination of technology and teaching practices is important, and that teaching toward a virtual generation relies on instructor creativity.

Other research about effective teaching has included alternative data collection of teacher effectiveness through seven less traditional ways (Cheng & Tsui, 1999): “(a) goal and task--emphasizes teachers' personal achievement goals and tasks and school goals; (b) resource utilization--requires teachers' effective use and procuration of school resources to achieve goals; (c) process--stresses teachers' contribution to effective teaching and school process; (d) school

constituencies satisfaction--expects teachers to meet the needs of their students, parents, school, and community; (e) accountability--focuses on teachers' accountability and professional reputation; (f) absence of problems--requires teachers to identify and avoid potential problems, weakness, dysfunction, and crises; and (g) continuous learning--emphasizes teachers' awareness of environmental changes and continuous improvement and development (p. 141)."

Harris (1998) stated that, "another area little touched on by existing studies is that of ineffective teaching practices. Is it the case that the characteristics of the ineffective teacher are simply the reverse of those of the effective teacher? At present there is insufficient empirical evidence to demonstrate that this is or is not the case (p. 180)." Several studies have given insights into particular styles that might help a teacher be more effective. These studies have included the use of humor in class (Berk, 1996; McMorris & Kim, 2003), the use of music (Berk, 2001), the use of storytelling (Cooney, Nelson, & Williams, 1998), and remembering students' names (Ricci, 2004). Yet, others have suggested there are parallels between a teacher's performance while teaching similar to the acting profession (Ewald, 2005).

Students do remember bad professors (Carson, 1999). Without studying the particular behaviors, tactics, and implementation strategies that teachers are using that are ineffective, it could be argued that we are making assumptions about what really does constitute ineffective teaching. Research about what is perceived to be ineffective teaching could be very helpful toward knowing what not to do. This might be as, or more, helpful than knowing what is effective. Regardless, students are demanding better teaching at higher education institutions (Zull, 2002). Sadly, some professors are not even considering the students in their own teaching practice and style (Zull, 2002). Some professors get caught up in trying to impress students with their command of the English language though the use of words that are rarely heard or

understood by the average student and do not aid in their own effectiveness as a teacher (Andrew, Cobb, & Giampietro, 2005). As Palmer (2007) so aptly stated, "technique is what teachers use until the real teacher arrives…" (p. 6).

Anding (2005) conducted an interview with Robert E. Quinn about transformational teaching. Quinn said that he had witnessed classes where students were half awake and draped over their desks. "I am sure the instructors would tell us those slumped students were not serious about education. In the end, we usually blame the victim" (Anding, 2005, p. 488). Quinn went on to elaborate by suggesting that what we are missing is not just the thoughts, behaviors, and techniques that teachers use, but the state of being they are in when they are fully committed. In the interview, Quinn said:

> "It seems surprising that teachers in a university, of all places, would be closed to alternative perspectives, yet many are. Hence, what we see in universities is much hypocrisy. There are many people in front of rooms advocating the virtues of open exploration while they themselves are not practitioners of that which they advocate. That is one of many reasons why students end up slumping in their chairs" (Anding, 2005, p. 492).

Anding (2005) found that when teachers begin asking themselves fundamental questions such as what were their greatest classes as a student and why, when were they most authentic as a teacher, and what do they love about teaching, faculty begin to move from ordinary to extraordinary. They challenge their own hypocrisy, increase their own integrity, and work toward making deep and transformational change.

Goldsmith (2003) describes lecturing as the oldest teaching method in the academy but that it remains the most common form of instruction despite the fact that research shows lecture alone is ineffective. Too often lectures become the default modus operandi because they are fast and efficient (Goldsmith, 2003). Ray (2004) says that using active teaching strategies can be

challenging for some professors because they may require extended blocks of time, space for movement, special preparation, or extra supplies and materials.

Mann (2001) suggests that traditional teaching methods are still frequently adopted despite the changes in the learning environment. "Evans and Abbott argue that most staff in higher education are already doing the best they can in a working environment characterized by growing and conflicting demands. These authors suggest that perceived pressure to change teaching methods can overwhelm staff who are already coping with more students and fewer resources" (Mann, 2001, p. 654). He went on to articulate that faculty can undermine new teaching methods by using old methods of assessment where their hidden curriculum perpetuates the status quo.

Linking classroom research with student perceptions in a co-curricular setting

McRee (2010) found that there is a connection between what researchers have discovered while conducting empirical research in the classroom with student perceptions of effective instructor behaviors/characteristics in leadership programs in non-traditional (co-curricular) environments. The researcher found that with few exceptions, the behaviors/characteristics identified by participants in non-traditional (co-curricular) environments map back to the findings and research about effective teaching in the classroom. These results inform us that much of what makes teaching effective in traditional classroom settings can be applied to non-traditional (co-curricular) programs. Participants placed high emphasis on (1) energy, (2) approachability, (3) role modeling, ethics, and integrity, (4) personal disclosure and vulnerability, and (5) managing diversity (McRee, 2010). Palmer's (2007) experience supports this. He said:

> "..in every class I teach, my ability to connect with my students, and to connect them with the subject, depends less on the methods I use than on the degree to which I know and

trust my selfhood – and I am willing to make it available and vulnerable in the service of learning" (p. 10).

These characteristics were emphasized and more pronounced than the findings and research about effective teaching in the classroom. The difference between this research and traditional classroom settings could be explained by the format and nature of the non-traditional (co-curricular) environment of The LeaderShape® Institute. In contrast to a traditional undergraduate class that might meet two or three times a week for 60 to 90 minutes, the LeaderShape® Institute is an intensive six-day program that is scheduled from 8:30 am to 10:00 pm for the majority of the program. These results are shown in the table below:

Table 4

Summary of Characteristics of Effective Teachers in Both Traditional And Non-Traditional (Co-Curricular) Classroom Settings.*

	Porter (1988)	Cashin (1989)	Feldman (1989)	Carson (1996)	Hativa (2001)	Silvestri (2005)	Baslow (2006)	McRee (2010)
Well Organized	X	X	X		X	X	X	
Expert Presentation/ Delivery	X	X	X	X		X		X
Master of Content/ Knowledge	X	X	X			X	X	X
Student-Centered	X			X	X	X	X	
Care & Compassion			X	X	X	X		X
Passion/ Enthusiasm			X		X	X	X	X
Availability to Students		X	X	X			X	
Fair/Timely Feedback	X	X	X		X			

Table 4 continued

Good Course Design		X			X	X		
Conducive Learning Environment			X		X			
Clarity & Effective Communication	X		X					
Humor				X	X		X	X
Approachability					X		X	X
Personal Disclosure/ Vulnerability				X	X			X
Managing Diversity							X	X
Integrity/Ethics								X
Listening								X

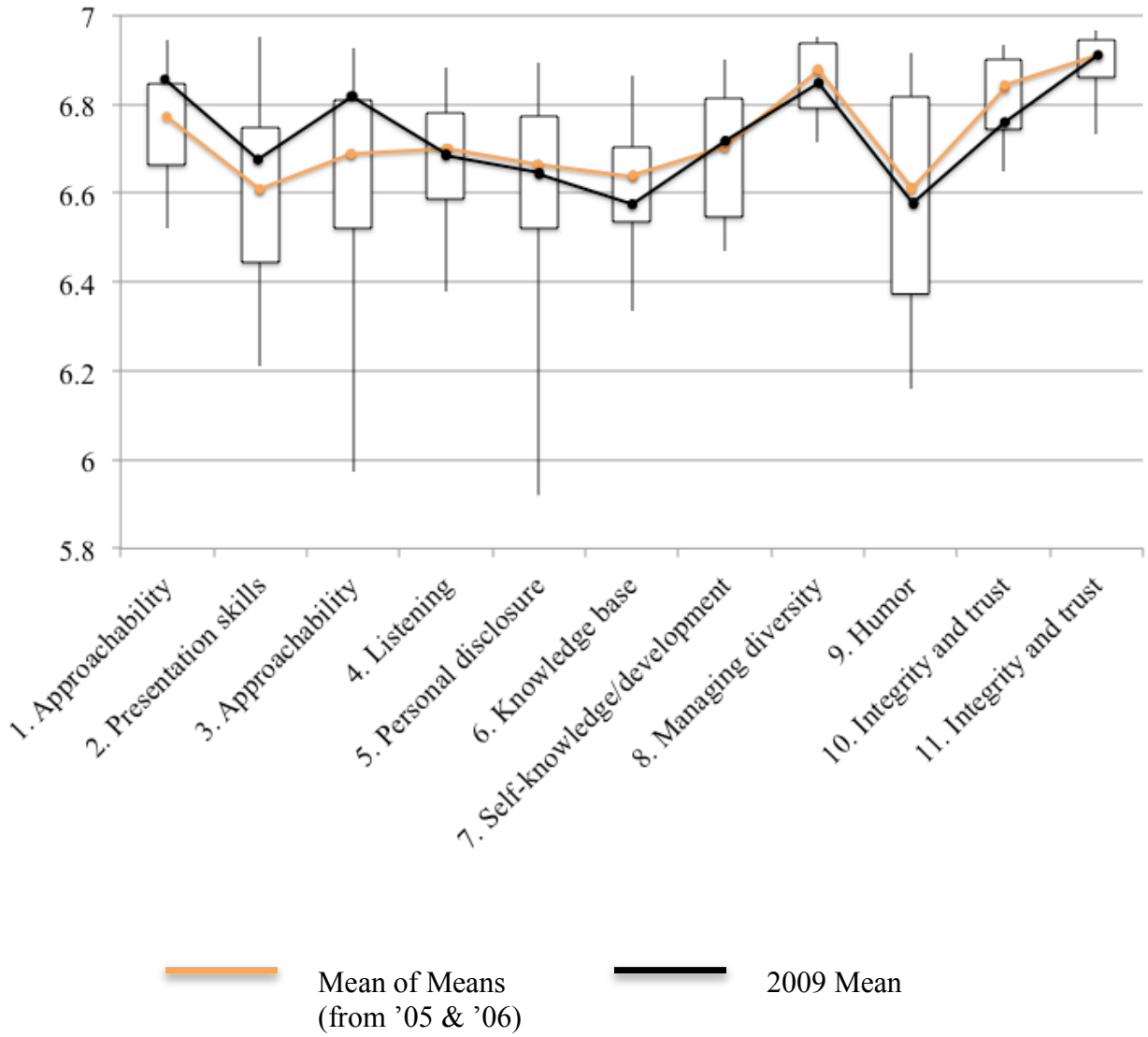
* McRee, M. A. (2010). *Student perceptions of effective instructor's behaviors/characteristics when learning in non-traditional (co-curricular) college and university leadership programs.* (Early Research Project), University of Illinois, Urbana-Champaign, IL.

McRee (2010) compared his results with LeaderShape® Lead Facilitator ratings of past years. While not all questions have been asked of participants and evaluated by LeaderShape®, 11 questions have been historically asked. The evaluations of twelve other sessions of The LeaderShape® Institute – six from 2005 and six from 2006 – were compared against the findings of the results from the 2009 session that was surveyed. For each year (2005 and 2006), three public and three private institutions (no institutions and no Lead Facilitators were the same) were used to gauge the survey results. McRee (2010) mapped the sixteen characteristics of effective instructors developed by LeaderShape® to the survey questionnaire items that students evaluated their lead facilitators. A few of the of questions asked were mapped to the same characteristic of effective Lead Facilitators which is why you notice that the same characteristic is listed in Table

5 below. These characteristics were not combined into a cumulative mean score since the questions asked were different.

Table 5

Comparison of Participant Survey Means with Sessions of The LeaderShape® Institute from 2005 and 2006 versus 2009.*



The results of the survey data collected by McRee (2010) show that this data is not a-typical when compared with twelve other sessions of The LeaderShape® Institute. Thus, the student perceptions of effective instructor behaviors/characteristics when learning in non-

traditional (co-curricular) college and university leadership programs found in this research may apply to other sessions of The LeaderShape® Institute.

Purpose of study

"Higher education has increasingly come under scrutiny by various stakeholders to demonstrate evidence of student learning, responsible stewardship of financial resources, and a practical, relevant curriculum that is appropriate to the modern times (U.S. Department of Higher Education, 2006)" (Stoker, 2010). There is pressure in higher education to teach and educate the whole student, including developing their leadership skills (American Association for Higher Education et al., 1998, June 2; American College Personnel Association, 1994; Ardaiolo, Neilson, & Daugherty, 2011; J. Arminio et al., 2009; Association of American Colleges and Universities, 2007; Eich, 2008; Keeling, 2004, 2006, 2009). In response, there has been a rise in leadership training, especially training outside-of-the-traditional classroom, but in one-time, multi-day, co-curricular leadership programs for undergraduate collegians Dalton and Crosby (2008) stated:

> "The student learning documents do not sufficiently address the issue of knowledge, skills, and training required for the teaching of transformative learning activities in out-of-class settings, and this topic needs more attention" (p. 9).

Dalton and Crosby (2008) further stated:

> "…the practice of utilizing student paraprofessionals as teachers and leaders in many student affairs education programs leaves the profession vulnerable to complaints about training and expertise. In order to advance the agenda of transformative education it is especially important that standards of knowledge and expertise be clearly defined for learning centered out-of-class activities" (p. 9).

There also has been added pressure to do the training well due to limited availability of training funds.

Past research has focused on many aspects of leadership development in higher education. These have included, but are not limited to: leadership theory, leadership models, outcomes, service learning, civic engagement, social identity models, professionalization of the student leadership educator, program evaluation, growth of leadership development programs, and even what aspect(s) in leadership should be taught. Research has not focused on the effective delivery of training. Even less is known about how to effectively offer one-time, multi-day, training programs, regardless of content (leadership, health care, personal development, etc.)

The lack of research on effective instruction in leadership programs is further heightened by the common practice of having leadership training performed by professionals or advanced students whose primary responsibilities do not involve teaching as pointed out by Dalton and Crosby (2008):

> "…the practice of utilizing student paraprofessionals as teachers and leaders in many student affairs education programs leaves the profession vulnerable to complaints about training and expertise. In order to advance the agenda of transformative education it is especially important that standards of knowledge and expertise be clearly defined for learning centered out-of-class activities" …The student learning documents do not sufficiently address the issue of knowledge, skills, and training required for the teaching of transformative learning activities in out-of-class settings, and this topic needs more attention" (p. 9).

There is an abundance of research conducted on effective teaching and what good teachers do in the college classroom. The purpose of this study is to expand this knowledge base to include characteristics of good teaching in leadership training programs conducted in one-time, multi-day, co-curricular leadership programs for undergraduate collegians. To accomplish this the study will employ research methods developed by Dr. Ken Bain in his 15-year research study and book *What The Best College Professors Do* (Bain, 2004b). Bain's approach was to

learn more about teaching to impact higher education. In doing this study and following Bain's initial research there will be significant value added to the understanding and impact of leadership training, particularly with the regard to the role of instructors, in other co-curricular, undergraduate leadership programs.

Bain (2004b) identified potential candidates (instructors) predominantly through interviews and recommendations from students and professors. Although Bain (2004b) utilized several sources of information over the course of the 15-year study, such as syllabi, assignment sheets, statements of grading policy, lecture notes, observation, student academic work, and colleagues' comments, he ultimately employed formal and informal interviews with instructors themselves, as the primary source to identify what the best college professors do. Given that the data in Bain's (2004b) study primarily came from interviews, additional data collection in this study, beyond interviews, such as instructor manuals, materials, and observation, was ruled out so as not to create a perceived evaluation of each of the respective programs or to infringe on intellectual copyright of each program. It was therefore determined that interviews would serve as the primary method of inquiry, like Bain (2004b), in this study as well.

The primary research question guiding this study is: What do good teachers do in college/university multi-day, one-time, co-curricular leadership programs? Six sub questions, derived from Bain's (2004b) study, were asked of teachers indicated to be excellent:

1. What do good teachers know and understand?
2. How do good teachers prepare to teach?
3. What do good teachers expect of their students?
4. What do good teachers do when they teach?
5. How do good teachers treat students?
6. How do good teachers check their progress and evaluate their efforts?

Findings from this study can help colleges/universities and organizations offering leadership training in multi-day, one-time, co-curricular leadership programs in their selection,

training, and evaluation of instructors/facilitators. It is also hoped that current trainers can use the results to self-assess their teaching effectiveness. Findings from this study also may have application in other environments. For example, there are numerous weeklong leadership training programs in America – corporate and otherwise. If this study provides insights regarding effective teaching practices in undergraduate, co-curricular leadership programs those findings may help inform practice for other week-long immersion programs.

Chapter 3

Design of the study

Introduction

Through qualitative interviews, this dissertation explored what good lead facilitators do in long-standing, co-curricular, multi-day, undergraduate leadership programs. The methodology chosen was designed to describe beliefs, capture perspectives, and examine the implications of instructor perspectives in these specific leadership programs that take place outside of the classroom with thousands of college students every year. Given the significant scholarship about effective teaching in the classroom, and the lack of scholarship about leadership programs that occur outside of the classroom, specifically related to teaching, this study was designed based on my desire to explore, define, and explain the collective efforts of good teachers in these unique environments. In order to better understand the role of instructors in these programs, I engaged in close examination of what practitioners think and do. This inquiry was designed to be both useful to the organizations and to the practitioners as a "means for people to achieve a clearer picture of who they are and what the real meaning of their social practice is" (Schwandt, 1989, p. 14).

As previously stated in chapters 1 and 2, undergraduate leadership educational programs are on the rise across the United States and have exponentially expanded during the past two decades. Given this substantial growth, particularly with the proliferation of co-curricular leadership programs taking place outside of the traditional classroom environment and due to the lack of studies regarding the role of instructors in these programs, I felt a need for a study to better understand what good instructors do and why they believe what they believe in long-standing, co-curricular, multi-day, undergraduate leadership programs. The need to better

understand the role of these facilitators in leadership programs through empirical research has been previously discussed (Dalton & Crosby, 2008). Consequently, the primary research question guiding this study is: What do good teachers do in college/university multi-day, one-time, co-curricular leadership programs? Six sub questions, derived from Bain's (2004b) study, were asked of teachers indicated to be excellent:

1. What do good teachers know and understand?
2. How do good teachers prepare to teach?
3. What do good teachers expect of their students?
4. What do good teachers do when they teach?
5. How do good teachers treat students?
6. How do good teachers check their progress and evaluate their efforts?

Data for this study were collected over a five-month time period, beginning in May, 2012. The core of this study's data was interviews of 15 good instructors from four different long-standing, co-curricular, multi-day, undergraduate leadership programs: four from LeaderShape®'s The LeaderShape® Institute, four from the North-American Interfraternity Conference's Undergraduate Interfraternity Institute (UIFI), three from the Association of College Unions International's I-LEAD® program, and four from Beta Theta Pi Fraternity's John and Nellie Wooden Institute for Men of Principle. These programs were selected because they are the longest-standing co-curricular, multi-day, undergraduate leadership programs that happen outside of the classroom. The LeaderShape® Institute has been conducted for 26 years, UIFI for 23 years, I-LEAD® for 19 years, and the John and Nellie Wooden Institute for Men of Principle for 14 years. Sources of data included: (1) 15 in-depth, recorded and coded interviews of 76 – 130 minutes each, (2) 15 follow-up interviews with each subject, recorded of 40 – 68 minutes each, and (3) observation and field notes by the researcher during the interviews.

This chapter is organized into two sections: (1) Methodological fit and (2) Method of study. Methodological fit begins with illustrating the importance of the researcher's worldview

when conducting research, provides rationale for why a qualitative interview approach should be pursued, discusses the methodology, and specifically highlights the features of credibility, goodness, and verification as criteria for this study. The method of study is introduced by describing the participants, sampling procedures, demographics that were included, and the safeguarding that took place in the study. The second subsection details the data collection processes, which include interviewing and triangulation. The third subsection describes the data analysis and how these factors were considered in this qualitative study. The last section in the method of study provides my own background and experiences that have shaped me as a researcher in section below titled the self as instrument.

Methodological fit

Creswell (2009) recommends that researchers make explicit their worldviews and philosophical ideas they espouse. "This information will help explain why they chose qualitative, quantitative, or mixed methods approaches for their research" (Creswell, 2009, pp. 5-6). He goes on to state that three items should be included: (1) the philosophical worldview, (2) a definition of basic considerations of that worldview, and (3) how the worldview shaped their approach to research. These three items are described below.

Patton (2002) states, "how you study the world determines what you learn about the world" (p. 125). It was my intent to help uncover what these instructor's "truths", explanations, and beliefs were – how they construct their reality in these settings – thus leading me to a social constructivism research approach (Patton, 2002). I approach my research from a postmodern social constructivist worldview. Creswell (2009) describes social constructivists as individuals who hold assumptions and "seek understanding of the world in which they live and work" (p. 8). I believe that individuals have subjective meanings and that these meanings are multiple and

varied, "leading the researcher to look for the complexity of views rather than narrowing meanings into a few categories or ideas" (Creswell, 2009, p. 8). Thus, Creswell (2009) suggests the goal of this style of research is to reply on participants' view of the phenomenon being studied. This method of inquiry lends itself to open-ended questions and to listening to participants' descriptions of what they say and do in their lives. Researchers with this worldview "focus on the specific contexts in which people live and work" (Creswell, 2009, p. 8). Creswell (2009) further elaborates by stating:

> "Researchers recognize that their own backgrounds shape their interpretation, and they position themselves in the research to acknowledge how their interpretation flows from their personal, cultural, and historical experiences. The researcher's intent is to make sense of (or interpret) the meanings others have about the world. Rather than starting with a theory (as in postpostivism), inquires generate or inductively develop a theory or pattern of meaning" (p. 8)
>
> Creswell (2009) cites Crotty's three major assumptions about constructivism:
>
> "1. Meanings are constructed by human beings as they engage with the world they are interpreting. Qualitative researchers tend to use open-ended questions so that the participants can share their views.
> 2. Humans engage with their world and make sense of it based on their historical and social perspectives – we are all born into a world of meaning bestowed upon us by our culture. Thus, qualitative researchers seek to understand the context or setting of the participants through visiting this context and gathering information personally. They also interpret what they find, an interpretation shaped by the researcher's own experiences and background.
> 3. The basic generation of meaning is always social, arising in and out of interaction with a human community. The process of qualitative research is largely inductive, with the inquirer generating meaning from the data collected in the field" (p. 8-9).

Creswell also states, "Qualitative researchers strive for 'understanding,' that deep structure of knowledge that comes from visiting personally with informants, spending extensive time in the field, and probing to obtain detailed meanings" (Creswell, 1998). I provide my own background and experiences that have influenced me later in this chapter under the heading below titled the self as instrument. My desire is to deepen our collective understanding of what and how good

teachers do what they do in co-curricular, multi-day, undergraduate college and university leadership programs.

Creswell (2009) summarizes a constructivist worldview to include understanding, multiple participant meanings, social and historical construction, and theory generation. Creswell (2009) also summarizes qualitative research and inquiry as including: (1) emerging methods, (2) open-ended questions, (3) interview data, observation data, document data, and audio-visual data, (4) text and image analysis, and (5) themes and patterns interpretation.

Given my own worldview and approach to research a qualitative inquiry, utilizing interviews was the most viable strategy toward identifying and learning the meaning constructed by good instructors in long-standing, co-curricular, multi-day, undergraduate college and university leadership programs.

Finally, Creswell (2009) suggests taking into account the research problem, personal experience, and the audience as further criteria for selecting a research design. When the researcher desires to identify or understand a concept or phenomenon because of little research being conducted on it, a qualitative approach to research is best (Creswell, 2009). Creswell (2009) summarizes and cites Morse by stating, "this type of approach may be needed because the topic is new, the topic has never been addressed with a certain sample or group of people, and existing theories do not apply with the particular sample or group under study" (p. 18). At the time of this study, no known research studies exist about the role of instructors in long-standing, co-curricular, multi-day, undergraduate college and university leadership programs. This coupled with my own personal experience, described in detail below under the self as instrument heading, and taking into account that the primary audience of the completed research will be

student affairs practitioners in higher education and leadership development, a postmodern, social constructivist, qualitative inquiry using interviews was an ideal match for this study.

Methodology

Practitioners are knowledgeable experts and efficient in their fields of practice (Glaser, 1978). Because a practitioner's knowledge is experiential "the researcher can offer ideas, categories, and a theory that integrates the diverse elements of practice" (Merriam & Simpson, 2000, p. 113).

Criteria for qualitative inquiry

This section highlights the factors important in ensuring the proper development of a good qualitative study. I adhered to the concept of goodness, introduced by Arminio and Hultgren, as an important factor to judge the worthiness of this qualitative research project (J. L. Arminio & Hultgren, 2002). Goodness has been identified as a more appropriate term than rigor (N. K. Denzin & Lincoln, 2000) by other qualitative researchers and allows for trustworthiness and authenticity (Lincoln & Guba, 2000).

Creswell (1998) states, "Ely et al. (1991) believe that using quantitative terms tends to be a defensive measure that muddies the waters and that 'the language of positivistic research is not congruent with or adequate to qualitative work' (p. 95)." As such, "to establish the 'trustworthiness' of a study Lincoln and Guba use the terms 'credibility,' 'transferability,' 'dependability,' and 'confirmability' as 'the naturalist's equivalents' for 'internal validity,' 'external validity,' 'reliability,' and 'objectivity' (p. 300)" (Creswell, 1998). In order to operationalize these emerging terms, Lincoln and Guba suggest techniques such as "prolonged engagement in the field and the triangulation of data of sources, methods, and investigators to

establish credibility" (Creswell, 1998). To ensure that the findings are ultimately transferrable thick description is required (Creswell, 1998).

Credibility

Creswell (2009) recommends such procedures as clarifying researcher bias, peer debriefing with the research team, triangulation, and utilizing an expert audit review to increase credibility. The criterion of credibility is met through my personal knowledge of the environment as a facilitator and employee of two of the four programs being researched which I will describe in greater detail at the end of this chapter. In addition, I utilized data triangulation and expert audit review to verify my findings in this study thus also meeting this criterion.

Goodness

Arminio and Hultgren (2002) introduce the concept of goodness as criteria to judge the value of qualitative research. In particular, six elements are offered through which goodness should be judged in a qualitative research study. They are: (1) the researcher's epistemological assumptions are made clear to the reader, (2) the researcher's assumptions drive the appropriate theoretical perspective and research methodology, (3) the researcher's methods should flow coherently from the methodology, (4) the researcher uses reflection with regard to the participants in the study and their relationship with the phenomenon being mindful of their power of representing different voices, (5) interpretation and presentation of the data offers news insight, and (6) research recommendations offer implications for professional practice. Each of these elements is described below in greater detail.

First, Arminio and Hultgren (2002) argue that constructivist research seeks to understand. "A major assumption of constructionism is that meaning occurs through engagement in the world – it is constructed. Researchers and participants are partners in the generation of meaning"

(J. L. Arminio & Hultgren, 2002, pp. 448-449). Since epistemological assumptions represent a belief system and how a researcher views the world, these theoretical underpinnings should be explained. As such, I provided my worldview earlier in this chapter and am explicit about how my own teaching and work experience have informed my approach later in this chapter under the section title the self as instrument.

Second, "to follow the goodness criteria, researchers must provide a theoretical justification for the methodology selected" (J. L. Arminio & Hultgren, 2002, p. 452). Characteristics such as openness, disclosure, and self-reflection are inherent in meeting the goodness criteria. Arminio and Hultgren (2002) state "goodness requires that each researcher know astutely the methodology supported by one's named theoretical worldview" (p. 452). To meet this criteria, precise coding and the development of categories will be represented visually, findings will be "grounded in the data as well as supported in the related literature," and the linkages will be "made clear and compelling" (J. L. Arminio & Hultgren, 2002, p. 453). I have made my own worldview explicit and justified the methodology earlier in this chapter. In addition, I followed the recommendations as set forth during the course of interviews and data analysis that created and developed openness, disclosure, and self-reflection.

Third, Arminio and Hultgren (2002) argue that the choice of method must stem from the methodology with one flowing into the other in a coherent manner. Data collection that includes a rich and thick description is essential for goodness to be achieved (Creswell, 2009). In addition, goodness requires that researchers provide their perspectives, experiences, and biases regarding the phenomenon being investigated (J. L. Arminio & Hultgren, 2002; Creswell, 2009). My experiences with two of the four programs – including my involvement as a participant, small group facilitator, lead facilitator, and employee – are explained in detail in the section

below in the self as instrument. This is elaborated on by Guba & Lincoln by stating, "…the 'text' should display honesty or authenticity about its own stance and about the position of the author" (Creswell, 1998). Guba & Lincoln go on to explain, "that the researcher needs to have a heightened self-awareness in the research process and create personal and social transformation. This 'high-quality awareness' enables the researcher to understand his or her psychological and emotional states before, during, and after the research experience" (Creswell, 1998).

Fourth, Arminio and Hultgren (2002) require the researcher to reflect upon their relationship with the participants and the phenomenon being studied, being mindful of their role and power in who and how the voices of participants are shared. Guba & Lincoln reinforce this by stating, "qualitative research must give voice to participants so that their voice is not silenced, disengaged, or marginalized. Moreover, alternative or multiple voices need to be heard in a text" (Creswell, 1998). While I am dependent upon the four participating organizations to provide the sample in snowball or chain sampling (Gall, Gall, & Borg, 2007; Patton, 2002), I made every attempt to provide a diverse pool of participants. Also, "researchers meeting the elements of goodness must not portray themselves as experts of others' experiences" (J. L. Arminio & Hultgren, 2002, p. 455). To ensure that this is met, participants were provided a summary of the written transcript of each interview with assumptions, thoughts, and insights for member checking (Creswell, 2009) and my findings were verified by others through the external peer audit with utilized intercoder agreement and cross-checking (Creswell, 2009; Kvale, 2007). Furthermore, trust between the researcher and the participant is crucial for goodness to be achieved. Guba & Lincoln support this development of trust by stating that qualitative research "involves a reciprocity between the researcher and those being researched. This means that intense sharing, trust, and mutuality exist" (Creswell, 1998). I developed trust on multiple levels

and supported this trust through appropriate interview procedures, the interview design, and execution as set forth by qualitative inquiry research guidelines (Kvale, 2007; Kvale & Brinkmann, 2009).

Fifth, in order to fulfill goodness for the presentation and interpretation of data that offers new findings, researchers must be open to the potential of new and rich meaning (J. L. Arminio & Hultgren, 2002). By providing my own background and assumptions, Arminio and Hultgren (2002) claim this increases the interpretation's legitimacy. Additionally, when evidence is coupled with processes such as triangulation, peer debriefing, respondent debriefing, or confirmability, the research is deemed representative, credible, and trustworthy (J. L. Arminio & Hultgren, 2002; Creswell, 2009; Kvale, 2007; Kvale & Brinkmann, 2009; Patton, 2002). To ensure goodness is fulfilled and the findings are "reasonable" and "probable," it requires the researcher to have peer, participant, and reader confirmability (J. L. Arminio & Hultgren, 2002, p. 457). In order to achieve this, I utilized an external auditor to review the entire research project (Creswell, 2009). "Both dependability and confirmability are established through an auditing of the research process" (Creswell, 1998).

Lastly, for goodness to be achieved, the researcher must present recommendations and implications for professional practice. Researchers should not engage in research for its own sake, but rather Arminio and Hultgren (2002) suggest that it "improves the lives of others" (p. 457). The research and findings should illustrate new insights for professionals that are seen as useful. This comes through providing recommendations on how practice can be improved and by "shedding new light on teaching and learning" (J. L. Arminio & Hultgren, 2002, p. 458). Again, Guba & Lincoln support this by sharing "the researcher shares her or his rewards with persons whose lives they portray" (Creswell, 1998). Therefore, it was critical to provide

discussion and attention of the research implications found as a result of this study. This criterion was met in chapter five by discussing the implications of the findings, identifying further research questions, and providing suggestions for future practice.

Verification

To sum, Creswell (1998) recommends that qualitative researchers employ at least two of his eight verification procedures in any given study. I employ seven of the eight recommended techniques including prolonged engagement and persistent observation, triangulation, peer review or debriefing, clarifying researcher bias, member checks, rich and thick description, and external audits.

Creswell (1998) states that prolonged engagement and persistent observation is achieved through "building trust with the participants, learning the culture, and checking for misinformation that stems from distortions introduced by the researcher or informants (Ely et al., 1991; Erlandson, Harris, Skiper, & Allen, 1993; Glense & Peshkin, 1992; Lincoln & Guba, 1985; Merriam, 1998)." This is achieved through my long-term work connected to these programs (15 years) and working for two of the organizations that are being studied. In addition, empirical research has been conducted through my early research project on student perceptions of good instructors as well as multiple interviews with the participating subjects.

Triangulation is achieved when "researchers make use of multiple and different sources, methods, investigators, and theories to provide corroborating evidence (Ely et. Al, 1991; Erlandson et al., 1993; Glesne & Peshkin, 1992; Lincoln & Guba, 1985; Merriam, 1998; Miles & Huberman, 1994; Patton, 1980, 1990)" (Creswell, 1998). Creswell (1998) goes on to state "typically, this process involves corroborating evidence from different sources to shed light on a

theme or perspective." Involving multiple interviews from multiple programs and organizations as well as having the data reviewed by an external auditor achieve this criterion.

Creswell (1998) describes peer review or debriefing as providing "an external check of the research process (Ely et al., 1991; Erlandson et al., 1993; Glense & Peshkin, 1992; Lincoln & Guba, 1985; Merriam, 1988)" and goes on to define the role of the peer reviewer as someone that "asks hard questions about methods, meanings, and interpretations; and provide the research with the opportunity for catharsis by sympathetically listening to the researcher's feelings." This is achieved through the involvement of the external auditor who was involved in my interpretation, coding, and meaning making of the data collected throughout the process, but particularly between the first and second interviews as the framework was developed as well as in the final draft of the findings.

"Clarifying researcher bias from the outset of the study is important so that the reader understands the researcher's position and any biases or assumptions that impact the inquiry (Merriam, 1998)" (Creswell, 1998). This researcher's bias, position, and assumptions are made explicit through the detailed description of the self as instrument and through the researcher's statement of good teaching found at the end of this chapter.

Member checks with the research participants are recommended by Creswell (1998) so that "the researcher solicits informants' views of the credibility of the findings and interpretations (Ely et al., 1991; Erlandson et al., 1993; Glesne & Peshkin, 1992; Lincoln & Guba, 1985; Merriam, 1998; Miles & Huberman, 1994)." Lincoln & Guba suggest that this is "the most critical technique for establishing credibility" because it "involves taking data, analyses, interpretations, and conclusions back to the participants so that they can judge the accuracy and credibility of the account" (Creswell, 1998). This criterion was met during the

course of the second round of interviews. Interview participants were sent their transcribed and coded first round interviews along with the proposed framework in advance of the second round interviews for discussion during the final interview.

"Rich, thick description allows the reader to make decisions regarding transferability (Erlandson et al., 1993; Lincoln & Guba, 1985; Merriam, 1998) because the writer describes in detail the participants or setting under study" (Creswell, 1998). This recommendation is met by providing both a detailed description of each participant in the study as well as significant background and information about the programs each instructor is involved in teaching.

Lastly, Creswell (1998) states "external audits (Erlandson et al., 1993; Lincoln & Guba, 1985; Merriam, 1998; Miles & Huberman, 1994) allow an external consultant, the auditor, to examine both the process and the product of the account, assessing their accuracy. This auditor should have no connection to the study." This final criterion was met by using Dr. Daniel Bureau as the external auditor who, as previously stated, served as a peer reviewer as well as the external auditor verifying the coding, interpretation, and findings of the researcher during and at the end of the process of research (see Appendix F). Dr. Bureau was selected given his intimate knowledge of qualitative research particularly connected to leadership programming of student affairs programs held outside of the classroom. At the time of this study, Dr. Bureau serves as the Director of Student Affairs Learning and Assessment at the University of Memphis.

Summary: Methodological fit

The qualitative research methods used in interviewing were tailored to this study through the recommendations of comprehensive design. Criteria from multiple theorists on qualitative inquiry were incorporated to safeguard that the data collected would yield credible results.

Through attendance to the elements of credibility, goodness, and verification presented by multiple researchers, I developed a sound, trustworthy, and good qualitative method study.

Method of study

This section provides an overview and detailed explanation of the study method, beginning with brief background of the differences between institutes, classrooms, and conferences. Then descriptions of the participants and purposeful sampling techniques are shared, taking care to ensure that the participants involved have appropriate measures in place to safeguard their participation. The data collection procedures describe how this analytical approach is grounded in the data to develop theory by using a two-phased approach to include interviewing and triangulation. I then present my approach to data analysis as recommended by theorists to support the construction of good qualitative study. I end this section with a full description and discussion of my role as the primary researcher conducting the study.

Background

How do institutes differ from the classroom?

When engaged in research and coming into contact with individuals outside of the academy, a common question others asked as I explained my dissertation research was: "What's the difference between an institute and the classroom?" There are several unique and key distinctions while other elements may have some reference and connection to a minority of classes taught in higher education. By providing my own background and assumptions, Arminio and Hultgren (2002) claim this increases the interpretation's legitimacy. The unique differences include, but are not limited to: (1) consecutive multi-day format, (2) held off-campus, (3) no academic credit, (4) no exams or quizzes, (5) limited authority of the teacher (i.e. does not assign worth through grades), and (6) attendance not required/personal choice.

First, while undergraduate classes also have a multi-day format it is typically meeting two or three times a week for approximately an hour or two. The multi-day institute format is vastly different. Each of the programs involved in this study has a multi-day format where the education is held over the course of several consecutive days (five or six days in length) from about 8 or 9 am to 10 or 11 pm daily. This speaks to the intensity of the institute experience and how it is different than a traditional undergraduate academic course.

Second, these institutes almost always are held off campus at locations such as retreat centers, fraternity or sorority chapter houses, or church camps. In rare occasions an organization may utilize portions of a college campus, but for the overwhelming majority of individuals attending they do not attend that college or university. I-LEAD® and the Wooden Institute exclusively provide national sessions where students from multiple campuses participate in the session. The LeaderShape® Institute and UIFI provide both national sessions and campus-based sessions. In all cases, the curriculum is the same regardless of the location or students participating. Rarely do the campus-based sessions for The LeaderShape® Institute or UIFI take place on the host institution's campus.

Third, to my knowledge, none of these institutes provide academic credit for attending. Therefore, there are often no prerequisites required to attend (some exceptions include the fraternity/sorority affiliation specific programs). Registration often is set up as a first come, first served basis and is not connected to leadership experience or title. If students want to attend and have the funding to do so, they may. Since all of the programs participating in this study offer national sessions, it also is not a requirement for students to attend a particular college or university or be a certain major to participate.

Fourth, institutes have no exams or quizzes. Students are not inclined to "study to the test" and teachers are not inclined to "teach to the test." This removes any potential stress associated with testing and students' questions are not geared toward nor focused on whether what they are learning will be on an exam.

Fifth, because there are no grades given for attending these programs, there is limited authority of the teacher. Lead facilitators do not assign grades in an institute. Often students feel that their worth is connected to the grading they receive in class. This allows for a much more collegial relationship between student and teacher. This may allow for more freely exchanged ideas and allow students to be more open to the content being presented rather than what level of performance is required to receive the grade desired.

Sixth, students attend by choice. Contrary to required coursework associated with an academic major or general educational requirements, students who attend these institutes are not required to attend and it's their personal choice to be there. On occasion, attendance may be incentivized, required because of elected student leadership role, or sanctioned, but these instances are very much the exception rather than the norm.

In addition, other characteristics of institutes often are unique but may be similar to a minority of undergraduate academic courses taught in the academy. These programs are one-time where rarely, if ever, would a student who has participated in an institute attend again in the participant role. They have a significant experiential or active learning component and although some academic courses have been designed to include more experiential activities, there are often restrictions, such as the class length, that do not allow for in-depth simulations lasting longer than an hour or low ropes teambuilding activities that may last as many as four. Institutes have a high reflection component where multiple styles of reflection designed into the

curriculum versus a classroom where reflection most often involves only a written component and is graded. These programs involve group work or simulations and they take place with a co-lead or small group facilitator present, whereas classroom assignments may have group work take place outside of the classroom. Institutes incorporate a co-lead facilitation model while the vast majority of undergraduate courses taught at a college or university have only one instructor. If an undergraduate course does utilize a team teaching model, subsections are often taught by a less skilled graduate student or teaching assistant. Lastly, with institutes there are no large lecture formats which enable a much more intimate feel. The combination of these factors illustrate how institutes can be and are significantly different that an undergraduate academic course. It is helpful to delineate these differences as a background and foundation for understanding.

How do institutes differ from a conference?

Another commonly asked question while engaged in this research was "What's the difference between an institute and a conference?" There are several unique and key distinctions. Conferences are shorter in length, typically three or four days in total, often over a weekend and potentially during the academic school year. Conferences almost always are held at a hotel or conference center that offer additional distractions or ways in which students can remove themselves from the educational nature of the program, whereas institutes are held off-campus at retreat facilities where there are fewer amenities than hotels or conference centers, further enabling total immersion and focus. Conferences regularly are held in an urban environment that offers more distractions with going out to eat, bars, and tourist attractions that are not tied to the educational content and programming. Conferences incorporate keynotes and multiple breakout options in their design and format whereas institutes have a set curriculum for

all to participate. Conferences frequently are very large in size and scope and may have hundreds or even thousands of attendees. Lastly, conferences rarely have an alcohol-free policy versus the institutes in this study are alcohol-free regardless of whether students are of legal drinking age.

These factors demonstrate how conferences can be, and are, significantly different than institutes. It is helpful to further explain these differences between traditional classes, conferences, and institutes as a backdrop of understanding and to provide context for the study.

Participants

Participants for this study serve as lead facilitators in one of four programs. They included LeaderShape®'s The LeaderShape® Institute, the North-American Interfraternity Conference's Undergraduate Interfraternity Institute (UIFI), the Association of College Unions International's I-LEAD® program, and Beta Theta Pi Fraternity's John and Nellie Wooden Institute for Men of Principle. Mentioned previously, these programs were selected because they are the longest-standing co-curricular, multi-day, undergraduate leadership programs that happen outside of the classroom. The LeaderShape® Institute has been conducted for 26 years, UIFI for 23 years, I-LEAD® for 19 years, and the John and Nellie Wooden Institute for Men of Principle for 14 years.

Sampling

How individuals are chosen for a study about what good teachers do is critical. This research was designed to be a qualitative one that involved purposeful sampling (Gall et al., 2007; Patton, 2002). Snowball or chain sampling procedures were used to obtain information-rich cases (Gall et al., 2007; Patton, 2002). Patton describes these "information-rich key informants" as individuals that take on special importance (Patton, 2002). Patton goes on to

describe information-rich cases as cases that one "can learn a great deal about matters of importance and therefore worthy of in-depth study" (Patton, 2002, p. 242). "In this case, one contacts certain organizations, departments, or individuals and asks them for suggestions as to who might be in a position to provide the necessary information" (Russ-Eft & Preskill, 2001, p. 304). Each of the four organizations was initially contacted to gauge their interest in participating in this research. All agreed and were asked for their expert nominations of their best lead facilitators (instructors). The organizations internally determined whom and provided the rationale for how they select their best teachers. A nomination criterion was not provided to the organizations in advance so as not to bias their selection of good lead facilitators. Allowing the organizations to determine their criteria also removed any potential bias I may have introduced based on my own thoughts of good teaching. The nominator from each organization had the direct and primary responsibility for overseeing and managing their respective institutes.

Staff from LeaderShape® provided the following list of guiding principles for their determination of good lead facilitators: (1) they believe full heartedly in LeaderShape® as an organization, (2) they trust and have respect for the curriculum that has been developed, (3) facilitating is not all about them, (4) they work to create space for participants to share their stories and experiences, (5) they know how to manage a group and use different techniques and styles to keep the group engaged, (6) they will admit that they are not perfect and that they are still works in progress, (7) they serve as ambassadors for LeaderShape® with our campus partners, and (8) they know the curriculum well and can infuse their own personal stories and style into that while still remaining true to the curriculum.

The staff from the North-American Interfraternity Conference (NIC) provided a list of considerations (in regard to things lead facilitators control/bring to the table during the

management/leadership of a program) in creating their list of good lead facilitators. First and foremost the NIC prioritized professional credibility as their highest qualification. The staff member stated:

> *Are they credible and trustworthy personally and professionally? Quite simply, I will not place someone who is lacking those qualities in a leadership/facilitation role for a NIC program. I left that out of the list as that is not an onsite performance related criteria, but something that is either there or not and sometimes is reflected onsite.*

The NIC's additional criteria included: (1) ability to develop trust and a sense of community among the facilitator team, the participants, and both groups combined, (2) ability to successfully facilitate the curriculum and adapt to the needs to the participants so that each participant can find their learning opportunities within the curriculum, (3) presence/confidence as a facilitator, (4) ability to connect with and relate to a diverse population of students, and (5) past experiences and preparedness. The NIC did note that nearly all of their nominations have a great deal of experience, with the youngest individuals on the list all having at least seven years of professional experience. They went on to say, "so something that clearly is an unwritten expectation is experience/seasoning as a professional and facilitator that creates professional credibility."

Staff from the Association of College Unions International's Institute for Leadership Education and Development (I-LEAD®) program used the following criteria to select their best lead facilitators: (1) the individuals served as small group facilitators at I-LEAD® prior to becoming lead facilitators, indicating: a) they were familiar with the format and content of the program, and b) they had a passion for the program that prompted continued involvement, (2) the individuals returned to serve as a lead facilitator for more than one session of the program,

indicating: a) the student evaluation results about the individual from their first year in the role were positive, b) the quality of their facilitation skills was acknowledged by the staff/volunteers leading the program as being valuable to the program, and (3) the individuals have been involved in the program in the past six years, indicating they have a working knowledge of the program's current format. Because the I-LEAD® program only takes place once or twice per year (the least amount of each of the programs studied), ACUI staff asked the researcher to note that they have a fairly limited pool to work from, but they also wanted to respect the process of developing criteria for identifying individuals to participate.

The staff from Beta Theta Pi Fraternity's John and Nellie Wooden Institute for Men of Principle provided the following list of criteria used in their selection of good lead facilitators: (1) experience with Beta Theta Pi Fraternity's leadership programs (preferably John and Nellie Wooden Institute for Men of Principle or the Chapter President's Leadership Academy), (2) knowledge of the basic operations/services/programs of Beta Theta Pi, (3) demonstrated ability to implement active training techniques, (4) ability to build authentic, trusting relationships with students quickly, (5) commitment to demonstrating integrity, (6) strong communication skills (articulate, clear, concise), (7) low drama/low maintenance, (8) understands "the guy dynamic" of all male participants and adjusts facilitation style appropriately.

Summary of sampling

What was similar or different about the criteria that each organization used? After receiving each participating organization's criteria of how they identified and nominated good lead facilitators, the natural question that came after was: what do they all have in common? Do they have agreement among their criteria? Is there consistency across the organizations? In short, the answer is yes. Their criteria is categorized and noted below:

Teaching/facilitation ability

- They know how to manage a group and use different techniques and styles to keep the group engaged. (LeaderShape®)
- Presence/confidence as a facilitator. (NIC)
- The individuals returned to serve as a lead facilitator for more than one session of the program, indicating: a) the student evaluation results about the individual from their first year in the role were positive, b) the quality of their facilitation skills was acknowledged by the staff/volunteers leading the program as being valuable to the program. (ACUI)
- Demonstrated ability to implement active training techniques, strong communication skills (articulate, clear, concise), understands "the guy dynamic" of all male participants and adjusts facilitation style appropriately. (Beta Theta Pi)

About the students

- They work to create space for participants to share their stories and experiences. (LeaderShape®)
- Ability to successfully facilitate the curriculum and adapt to the needs to the participants so that each participant can find their learning opportunities within the curriculum, ability to connect with and relate to a diverse population of students. (NIC)
- Ability to build authentic, trusting relationships with students quickly. (Beta Theta Pi)

Past experience

- Past experiences and preparedness. (NIC)
- The individuals served as small group facilitators at I-LEAD® prior to becoming lead facilitators, the individuals have been involved in the program in the past six years, indicating they have a working knowledge of the program's current format. (ACUI)
- Experience with Beta Theta Pi Fraternity's leadership programs (preferably John and Nellie Wooden Institute for Men of Principle or the Chapter President's Leadership Academy). (Beta Theta Pi)

Knowledge/commitment of the organization

- They believe full heartedly in LeaderShape® as an organization, they serve as ambassadors for LeaderShape® with our campus partners. (LeaderShape®)
- They had a passion for the program that prompted continued involvement. (ACUI)
- Knowledge of the basic operations/services/programs of Beta Theta Pi. (Beta Theta Pi)

Who they are as individuals

- Facilitating is not all about them, they will admit that they are not perfect and that they are still works in progress. (LeaderShape®)
- Professional credibility. (NIC)
- Commitment to demonstrating integrity, low drama/low maintenance. (Beta Theta Pi)

Knowledge of the program/curriculum

- They trust and have respect for the curriculum that has been developed, they know the curriculum well and can infuse their own personal stories and style into that while still remaining true to the curriculum. (LeaderShape®)
- They were familiar with the format and content of the program. (ACUI)

Ability to develop team

- Ability to develop trust and a sense of community among the facilitator team, the participants, and both groups combined. (NIC)

Three of the four organizations provided several possible lead facilitators who met their criteria and might have been willing to participate in this research. The staff at LeaderShape® initially provided 34 possible participants. The NIC provided 13 possible participants. Beta Theta Pi Fraternity provided 11 possible participants. As was stated previously, because ACUI's I-LEAD® program only takes place once or twice per year, ACUI had a more limited pool to initially work from, but provided five possible participants.

Given the larger list of potential participants from three of the four organizations, I went back to each of the three organizations who had provided more than 10 possible participants, LeaderShape®, the NIC, and Beta Theta Pi Fraternity, to ask for them to further narrow down their initially provided list. I asked these three organizations to provide an "A" and a "B" list, "A" being their best of the best lead facilitators. Each of the three organizations who initially provided more than 10 lead facilitators did so and this took the possible sample size for LeaderShape® from 34 to 16, at the NIC from 13 to 7, and at Beta Theta Pi Fraternity from 11 to 5.

After receiving the revised lists of possible participants from each organization, I began the process of purposeful sampling after receiving approval by the University of Illinois Institutional Review Board. I contacted those identified by each organization as good lead

facilitators by electronic letter to gauge their willingness to and interest in participating in this research. The electronic invitation letter sent is provided in Appendix B. The electronic letter provided a brief overview of the study, explained that they have been nominated to participate by one of the organizations, asked for their interest and willingness to participate, described that the study would include an initial interview and a follow up interview, and finally asked if they had any initial questions with the instruction to contact me directly if so.

Patton states, "there are no rules for sample size in qualitative inquiry" (Patton, 2002, p. 244). Patton goes further to describe sample size:

> "Sample size depends on what you want to know, the purpose of the inquiry, what's at stake, what will be useful, what will have credibility, and what can be done with available time and resources" (Patton, 2002, p. 244).

Since this study is a multiple-case study design, "the unit of analysis needs to be at least two or more individuals or two or more instances of a phenomenon, selected either to be similar to each other or different from each other in some way that is of interest to the researchers" (Gall et al., 2007, p. 178). It was determined by the committee that we should start initially with at least three participants from each program and continue conducting research until saturation was reached.

Given my knowledge of the organizations and experience, I estimated that I would have a positive response rate of more than 50%. Each of the four initial contacts associated with LeaderShape®, the NIC, and Beta Theta Pi Fraternity all agreed with the initial electronic invitation. Three of the five possible participants from ACUI agreed initially, the remaining two declined due to current obligations (one was changing jobs during the study; the other was currently overseas conducting research for their dissertation and was getting married). I was very pleased that this provided an 88% positive response rate to participate in the study. The

diverse pool of participants would later provide the researcher with the opportunity to ensure breadth, depth, and perspective.

Demographics

Demographic information regarding the participants was collected. Demographic data that was asked for are name, title, organization/institution, gender, age, ethnicity, number of sessions attended and facilitated (as both a small group facilitator and a lead facilitator), and number of years facilitating in each program. This form is located in Appendix C. Lead facilitators from each of the four programs come from a variety of backgrounds. From the 15 participants, seven currently work at higher education institutions, five from non-profit organizations, one owns their own consulting company, one works in corporate, and one as a stay-at-home mom. They range in age from 29 to 55 with the mean age of 39.93 and median age of 39. All have undergraduate degrees and master's degrees (13 master's degrees in higher education, one with an MBA, and one with a degree in organizational behavior), with four holding terminal doctorate degrees, and one having an additional master's degree in divinity. Eight are male and seven are female. The participants self-identify as Caucasian (13) and African-American (2) and twelve currently are married/partnered and four have children. Participants collectively have attended the institutes being studied a combined 232 times: seven as undergraduate participants, 14 as small group facilitators, and all as lead facilitators. Each participant had been a lead facilitator at least three times with the most experienced lead facilitator serving in the role for 39 programs. The mean number of sessions served as a lead facilitator was 11.47 and the median was 6. All have participated and facilitated many other additional programs that were not included in this research including teaching undergraduate courses.

Safeguarding

Several measures were put in place to safeguard the individuals willing to participate in this study. Creswell states that the researcher has an obligation to "respect the rights, values, and desires of the informant(s)" (Creswell, 2003, p. 201). The research objectives were explained to participants through the invitation letter and interview process. Participants were given the opportunity to remain anonymous if they chose, but each chose to wave their anonymity. I had sole access to the notes, interview transcriptions, and transcribed interviews or any other identifying participant information. That information was kept locked in my personal possession throughout the course of this study. All electronic documents kept on my computer were password protected. Interviews were transcribed soon after they took place. I audited each interview record for accuracy and anonymity. After the initial interview was conducted and the external auditor verified the proposed framework, a summary of my assumptions, insights, and coded findings in the transcripts were sent to each participant for review prior to the second interview. Each participant was given the opportunity to edit, change, or correct content as they deemed necessary. After confirmation that the participant had reviewed the summary transcript for accuracy, I destroyed the electronic audio file of the interview recording. Only those who had direct ties to this study (e.g. the dissertation committee and the external auditor) and I had access to written transcripts, summaries, and field notes.

Data collection

In qualitative research, important characteristics should take into account "both traditional perspectives and the newer advocacy, participatory, and self-reflective perspectives of qualitative inquiry" (Creswell, 2009, p. 175). The nine characteristics described are: (1) taking into account the natural setting by "talking directly with people" and through interactions "over

time", (2) acknowledging and utilizing the researcher as a key instrument in the inquiry, (3) use multiple sources of data, (4) data analysis should be inductive, (5) participants' meanings should be the primary focus, (6) the research process should be emergent, (7) the researcher must view the study through a theoretical lens, (8) the inquiry should be interpretive, and (9) a holistic picture is to be established taking into account the many facets of the phenomenon (Creswell, 2009). As such, the interviewing and triangulating aspects of this study are described below.

Interviewing

My research questions informed and shaped the research method utilized. Patton (2002) suggests, "qualitative interviewing begins with the assumption that the perspective of others is meaningful, knowable, and able to be made explicit. We interview to find out what is in and on someone else's mind, to gather their stories" (p. 341). To better understand the thoughts and experience of good facilitators in long-standing, co-curricular, multi-day, undergraduate leadership programs, the method of interviewing created a cogent match. Interviews in a qualitative inquiry provided the opportunity to better know and comprehend these unique and rich cases that shape the experience of instructors in these leadership programs.

A test pilot interview was recommended by the committee and conducted. The pilot interview was held with Dr. Dave Rosch who currently serves as a lead facilitator for LeaderShape®. Dr. Rosch has intimate knowledge and understanding of LeaderShape® and has served in several capacities. He has been a small group facilitator for The LeaderShape® Institute, sponsored students to attend national sessions, served as program coordinator for the University of Illinois session of The LeaderShape® Institute, and as a lead facilitator for six sessions of The LeaderShape® Institute. Dr. Rosch has also been closely tied to leadership development within higher education serving as the Program Director for the Illinois

Leadership® Center at the University of Illinois and currently an Assistant Professor in Human and Community Development in the College of Agricultural, Consumer and Environmental Sciences teaching leadership at the University of Illinois. Dr. Rosch has conducted research about and published research about LeaderShape® in several publications. The initial pilot interview tested the interview guide successfully to ensure that the questions being used from Ken Bain's (2004) research and book *What The Best College Teachers Do* would lead to good data for this study. Dr. Rosch's pilot interview followed the interview guide (Appendix D) and the pilot interview lasted for one hour and thirty-five minutes. Dr. Rosch and I debriefed the pilot interview guide and questions following the interview and he agreed that the structure, flow, and questions were appropriate for this research study.

Interviewing used in research dates as far back as the population censuses with ancient Egyptians (Norman K. Denzin & Lincoln, 2008). Interviews were conducted face-to-face, over the phone, or over the internet (e.g. Skype) with the participants at their convenience. Nine of the fifteen first round interviews were conducted face-to-face and the remaining interviews were conducted over Skype. A brief explanation was provided by the researcher about the purpose of the study, in accordance with the University of Illinois Institutional Review Board (IRB) guidelines. The opportunity to read the consent form in advance was provided and participants were asked if they had any questions before interviews begin. Interviews were estimated to be an hour but no longer than two hours in a given setting and were voice recorded with the participant's permission. First round interviews varied from one hour and 16 minutes to two hours and 10 minutes.

The interview guide and protocol I used started with an introduction and explanation of the purpose of the study, a brief overview of the interview process, a review of the informed

consent form, completion of the participant data form, and an opportunity to clarify and answer any participant questions before beginning, as recommended (Kvale, 2007). A semi-structured interview guide was developed (see Appendix D) in advance with sequenced and categorical questions, but allowing for the opportunity for clarification, further explanation, and follow up based on the interviewee's answers and for new directions to be explored if and as they open up (Kvale, 2007). As Kvale suggests, I tried to balance a combination of spontaneity and structure with an eye toward the end analysis with conceptual structuring. As previously stated, the interview guide used questions directly from previous research about what good teachers do (Bain, 2004b). Accentuating flexibility over stringency, the interview guide provided a loose framework allowing the interview to go deeper than ordinary conversation.

An additional follow-up interview took place with each participant after the initial interview took place. As discussed with the initial interview, the follow-up interview took place at the participant's convenience. This follow-up interview also utilized a semi-structured interview guide (see Appendix E). After each interview, participants had the opportunity to review a written summary of their transcript that detailed my assumptions, connections, and insights as well as my coding and the coding of the external auditor. Each participant was provided the opportunity to make any edits, changes, or corrections. In addition, each participant was provided in advance a draft of the developed framework for their input, reactions, and feedback for our discussion. The researcher also took notes during all of the interviews. Interviews were conducted with lead facilitators of each of the four participating organizations until theoretical and categorical saturation was achieved (Seidman, 2006). Second round interviews varied from 40 minutes to an hour and eight minutes. All of the second round interviews were conducted over the phone. The quality of follow up interviews conducted over

the phone were of equal quality given that a relationship had already been established through more personal first round interviews conducted face-to-face or via Skype. The participants' level of comfort with the researcher is further emphasized because all waived their confidentiality signifying a strong level of trust.

In accordance with Kvale, common interview studies are expected to be around 15 ± 10, providing a combination of time and resources available without impacting a law of diminishing returns (Kvale, 2007). While many researchers prefer an emergent and fluid research design, Seidman (2006) notes that estimates in the number of participants can be done in advance, but that firm concentration on the number of participants may evade more purposeful consideration of sufficiency and saturation.

I initially designed that three or four interviews would take place from each of the four participating organizations and programs. 'Enough' is described by Seidman (2006) as "an interactive reflection of every step of the interview process and different for each study and each researcher" (p. 55). As previously mentioned, interviews continued until patterns emerged and saturation was achieved (Seidman, 2006). A total of 15 initial interviews were conducted and each included a follow up interview.

Triangulating

In qualitative research studies, Creswell (2009) suggests triangulating different data "by examining evidence from the sources and using it to build a coherent justification for themes" (p. 191). If these themes are based on the converging data or perspectives, it adds to the validity of the study conducted (Creswell, 2009). If not considered, it could be a fair critique of this study that a limitation of its design is the lack of student voice on what constitutes good instruction by teachers in long-standing, co-curricular, multi-day, undergraduate college and university

programs. How can you truly know what good teachers do in these settings if you do not take into account the students?

Previously discussed in chapter two, as a part of my early research project, I conducted a study titled *Student Perceptions of Effective Instructor's Behaviors/Characteristics When Learning in Non-Traditional (Co-Curricular) College And University Leadership Programs* (McRee, 2010). My findings dovetailed well and established emergent views of effective teaching conducted in traditional classroom settings. My study not only confirmed the findings of other researchers, but it furthered the discourse by providing additional insight into student perceptions of effective behaviors and characteristics of instructors in long-standing, co-curricular, multi-day, undergraduate college and university programs.

The findings of the study show that student perceptions of effective instructors included such empirically researched well-known characteristics and behaviors as: (1) expert presentation/delivery, (2) mastery of content/knowledge, (3) care & compassion, and (4) passion/enthusiasm (McRee, 2010). In addition, the participants placed high emphasis on and highlighted other, less explicit factors such as: (1) energy, (2) approachability, (3) role modeling, ethics, and integrity, (4) personal disclosure and vulnerability, and (5) managing diversity (McRee, 2010).

McRee (2010) went on to compare the evaluation results of both LeaderShape® lead facilitator's ratings on 11 characteristics with other evaluations of sessions of The LeaderShape® Institute. The results of the survey data collected by McRee (2010) show that the data is not atypical when compared with 12 other sessions of The LeaderShape® Institute. Thus, the student perceptions of effective instructor behaviors/characteristics when learning in non-traditional (co-curricular) college and university leadership programs found in my early research

may apply to other sessions of The LeaderShape® Institute. Therefore, the students', the participants', or the end users' perceptions were taken into account in the design of this study.

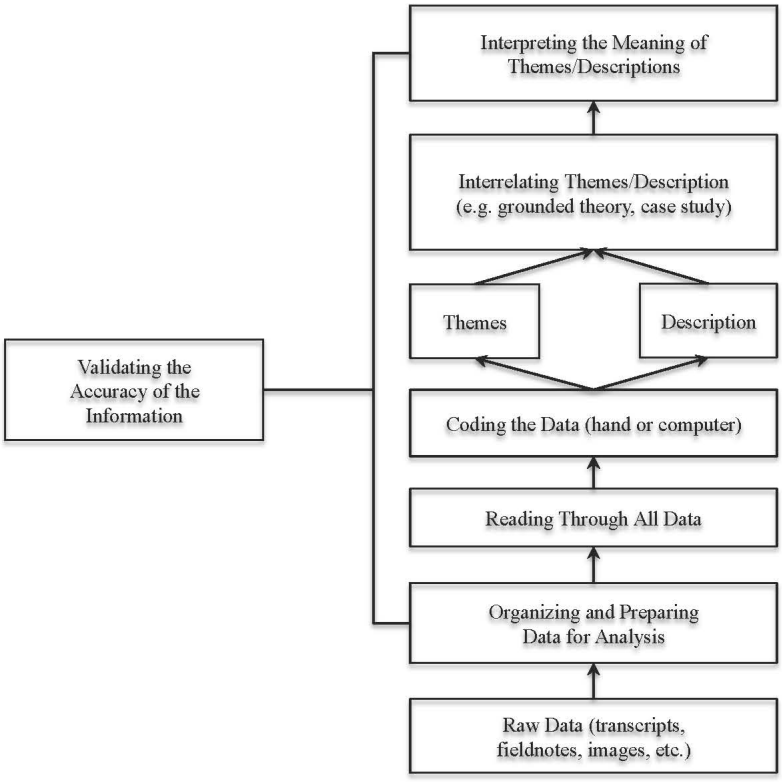
Because the focus of this study is about instructor's perceptions of good teachers in long-standing, co-curricular, multi-day, undergraduate college and university programs it was necessary to expand this study to more than just instructors of LeaderShape®'s program, The LeaderShape® Institute. Only very similar programs with the most longevity were considered. As a reminder, the programs include LeaderShape®'s, The LeaderShape® Institute (26 years), the North-American Interfraternity Conference's Undergraduate Interfraternity Institute (23 years), the Association of College Unions International's I-LEAD® program (21 years), and Beta Theta Pi Fraternity's John and Nellie Wooden Institute for Men of Principle (14 years). Each range from five to six days in length, use an institute format held primarily off campus and outside of the classroom, and each employ a co-teaching model of instruction. Data, through interviews, was provided by multiple instructors from each program for different perspectives and sources of information to create triangulation (Creswell, 2009).

Data analysis

Data analysis and interpretation in qualitative research involves several components. The process "involves making sense out of text" by "preparing the data for analysis, conducting different analyses, moving deeper and deeper into understanding the data" in way that peels "back the layers of an onion" and represents the data through making interpretations and larger meanings (Creswell, 2009, p. 183). The analysis is ongoing and involves continual reflection, analytical questioning throughout the study. In essence, Creswell (2009) distilled this process to "gathering data, making interpretations, and writing reports" (p. 184). Data analysis in qualitative research involves collecting information from the participants in the study through

asking questions. This qualitative inquiry occurs through designed steps with multiple levels of analysis. The process, although shown below – first visually in Figure 1 in a hierarchical way and then described in a linear way through text – actually occurred in an interactive and interrelated way.

Figure 1: Data Analysis in Qualitative Research



(Creswell, 2009, p. 185)

Creswell (2009) emphasizes six steps when following this model of data analysis in qualitative research. First, the data must be organized and prepared for analysis. "This involves transcribing interviews, optically scanning material, typing up field notes, or sorting and arranging the data into different types" (Creswell, 2009, p. 185). After I conducted the interviews, the interviews were transcribed by a third party while I simultaneously continued to

conduct interviews based on the participants' and researcher availability over the course of two months.

Second, the researcher should gain a general sense of the data by reading through it to reflect on its tone, depth, credibility, and use (Creswell, 2009). After all interviews were conducted and transcribed I listened to the audiotapes while reading the interviews and made edits based on audio quality and specific words/clarification to verify as an accurate transcript. The 15 interviews resulted in 392 single-spaced pages of transcribed data. I then read through each interview and coded them.

Third, detailed yet emergent coding of the data is recommended through organizing the material into categories that expected – not anticipated – unusual, conceptually interesting, and/or that addressed larger theoretical perspectives. Rigor is enabled through coding by hand and through computer software (Creswell, 2009). Open coding was the first level of data analysis in the study and was done by hand. At this stage, the data were organized into initial broad categories and initially resulted in 1,343 applications (occurrences) of 27 codes from the 15 interviews.

Open coding was informed by the empirical research of what good teachers do in the classroom and the early research project conducted on student perceptions of what good lead facilitators due from institutes and were confirmed in the data. This initial list of codes is first displayed in Table 1 in chapter one and Table 4 in chapter two. These codes provided a starter list for the open coding conducted by hand and were verified through the themes emerging from the data. Additional codes were developed through this study based on interviews with lead facilitators.

I then consulted my advisor on the appropriate timing and frequency of when to involve the external auditor. It was agreed that it would be best to involve the external auditor in between the first and second rounds of interviews. This allowed the auditor to verify and confirm that the coding was accurate before I approached the study participants for member checking and to gain their feedback about the emerging model and themes. My initial coded interviews were shared electronically. The external auditor reviewed the coded transcribed interviews in the order of the leads from the Wooden Institute, then I-LEAD®, then UIFI, and finally The LeaderShape® Institute. I-LEAD® was done after the Wooden Institute to check for the difference between a general student context versus a fraternity-only context. The external auditor reviewed the coded transcripts over the course of a six-day period to fully immerse himself in the data (see Appendix F). The external auditor's overarching role was to confirm if the researcher's codes were, in fact, correct, and to offer cases in which he thought more coding or different codes may have been presented. The external auditor acknowledged that he is inclined to excessively code. The external auditor felt saturation was achieved through 15 interviews because of the frequency of codes that were found among all interviews. The external auditor also provided a summary of his distilled findings in a very cogent document of 187 initially defined statements of what good leads do in institutes after reading through all 15 interviews.

I electronically received the coding feedback of each interview from the external auditor. I first read through all of the comments to get a general sense of the feedback and followed this with a phone conversation with the external auditor to gain clarity about the feedback. Following the external auditor's review, the coding changed slightly by adding 25 application (occurrences) of codes from the transcribed interviews and the removal of 40 application

(occurrences) of codes – a 96% agreement of codes between the external auditor and myself. This left 1,328 applications (occurrences) of 27 codes that were established and verified.

Fourth, analysis occurred through description of categories or themes that represent major findings based on specific evidence (Creswell, 2009). I found that many codes from the literature about good teaching in the classroom emerged, codes from my early research project about student perceptions of good leads emerged, and additional codes that identified by the lead facilitators themselves emerged. These codes were counted and all of the codes were put in a frequency distribution spreadsheet. The coded data was then sorted in several different ways to provide further understanding and clarity to see what larger themes emerged and this provided me multiple visual ways to make sense of the coding and data. I also kept a journal of questions that emerged about what I was finding and constantly went back to review these notes throughout the data analysis process.

Once the codes had been labeled or "named," they were grouped into higher order categories. Ultimately, the 1,328 applications (occurrences) of codes fell into 27 unique categories that were identified from the 15 interviews. This resulted in the following breakdown: 11 categories (798 individual mentions) mapped to the literature about good teaching in the classroom, six categories (198 individual mentions) mapped to my early research project on student perceptions of good lead facilitators, and 10 additional categories (332 individual mentions) emerged that were identified from the lead facilitators themselves from this study. These codes and categories became the foundation for the framework building process.

Fifth, the model is described in detail to illustrate the themes and results (Creswell, 2009). In addition to visualizing the data in numerical form in spreadsheets, I also drew several diagrams to see how the data and coding would emerge into a framework. Several metaphors

were provided by the participants themselves as they described their own process including things like a journey, a family, a rollercoaster, a road/road map, a machine engine, and an onion to name a few. The final visualizations of the data are provided in chapter four. The framework, frequency distribution, coded and transcribed interviews, along with the statements developed by the external auditor were provided to each interview participant in advance of the second round of interviews to allow them to digest the information, to conduct member checking for agreement/disagreement, and to provide context to our follow-up interview. Each participant was asked for thoughts since we had our first interview, reactions to the information provided, and final thoughts in the second and final interview.

Lastly, I provide my interpretations grounded in the data and couched from my perspective, interpretation, understanding, and background (Creswell, 2009). As such, my interpretations are included in chapter four with the framework and accompanying examples of participants' comments that provide context, clarity, depth, and description to each of the categories that emerged.

To sum, although discussed previously, to ensure qualitative goodness and reliability are achieved I employed multiple procedures. As stated by Creswell (2009) to achieve reliability, I checked the transcripts so that no mistakes were made and verified each interview with each participant (member-checking), used constant comparative analysis in coding, and used intercoder agreement (cross-checking) with the external peer auditor to determine consistency. To achieve goodness, I used triangulation, member-checking, and rich, thick description, presented researcher bias, engaged in self-reflection, provided negative or discrepant information that runs counter to the themes developed when appropriate, spent prolonged time studying the

phenomenon, used peer debriefing for accuracy, and an expert audit review for verification of the findings (J. L. Arminio & Hultgren, 2002; Creswell, 2009).

The self as instrument

Developing sound qualitative inquiry that has validity requires the researcher to be explicit about their own experiences and biases (Creswell, 2009). Creswell (2009) states, "good qualitative research contains comments by the researchers about how their interpretation of the findings is shaped by their background, such as their gender, culture, history, and socioeconomic origin" (p. 192).

My research interest in what good teachers do in these unique long-standing, co-curricular, multi-day, undergraduate leadership programs is connected on many levels. Growing up as a male in a white, upper-middle class family where both of my parents attended college has no doubt influenced me as an individual. My parents, although divorced when I was born, supported my undergraduate education both in spirit and practice by paying for and providing my attendance to college. As the youngest child of three by my parents, I spent school months with my mother in the Midwest and summers with my father in the southeast. I lived in various small, medium, and large towns throughout my childhood. Due to my mother moving during high school from Kansas to Texas, I attended three different high schools. As a result, high school was a challenging time for me where I felt I was never able to gain a foothold.

Attending college, being involved in extracurricular activities, and assuming leadership positions with various organizations were profound and significant learning experiences. As an undergraduate student, I participated in the Undergraduate Interfraternity Institute (UIFI) during my senior year in 1994. It was a powerful and transformative learning experience for me. After graduation, I went on to work for the North-American Interfraternity Conference (NIC) – the

organization that developed and executes UIFI – between 1995 and 1997. During this time, I served as a small group facilitator several times as well as a lead facilitator. Additionally, I intimately was involved in the execution of the program and played minor roles in curriculum. I remained involved as a lead facilitator and co-led several institutes through 1999. After leaving the NIC, I continued my UIFI involvement and served on their curriculum development team for two years while employed by the University of Oregon.

After working in student affairs at the University of Oregon for almost three years, I was hired at LeaderShape® and began work in January of 2000. During my tenure at LeaderShape® I participated as a cluster facilitator (small group facilitator) and then as a lead facilitator. In total, I have served as a lead facilitator, co-leading The LeaderShape® Institute, 18 times through 2012. My primary roles within LeaderShape® have been many during the past 13 years, but most often I have had responsibility for the growth of the program through sales and fundraising. Due to LeaderShape®'s small staff, I also have contributed to curriculum development and provided input toward the selection and ongoing training of our cluster facilitators (small group facilitators) at national sessions, which LeaderShape® manages over the summer. In addition, I have been involved in the design and training of LeaderShape®'s lead facilitators at LeaderShape®'s annual Lead Retreat. While I have been involved in this capacity, I have not had direct supervision of LeaderShape®'s lead facilitators – this primary focus has fallen to other staff.

I remain fascinated by the dynamics created at each of these institutes and believe in their power to provide a transformative learning experience and environment that, to date, I have not experienced in other capacities. I have seen, firsthand, the value of these programs and believe in their format for both undergraduate students and the facilitators involved. Each of these

organizations can provide hundreds of testimonials by participants and graduates attesting to the impact and influence they provide. As shown in chapter two, increasing research points to the influence as well. Combined, I have participated in 28 institutes that involve the long-standing, co-curricular, multi-day, undergraduate leadership program format that were the focus of this study. I have engaged in many conversations about what makes these environments and programs unique – often involving dialogue about whether the root of their effectiveness can be attributed to the curriculum or the facilitators, or both. In a presentation at the International Leadership Association's annual conference, Dr. Dennis Roberts, Dr. Laura Osteen, and I first spoke directly about what LeaderShape® has found to be critical in its success. At time of LeaderShape®'s 20th year, we considered best practices to include such factors as curriculum, training, environment, people, selection, quality, time, execution, assessment, capacity building, and the compounding effect of each of these best practices (McRee, Roberts, & Osteen, 2005; McRee et al., 2006). While we believe all of these factors are vital for a successful long-standing, co-curricular, multi-day, undergraduate leadership program, the focus of this study is on the role of the lead facilitator. Additionally, through my own undergraduate and graduate classroom experience and from presenting, keynoting, and facilitating hundreds of workshops and programs, I have seen firsthand the challenge and difference between knowledge of a subject and the ability to teach it. My quest and research interest revolves around identifying crucial influences on what instructors and facilitators do to create good learning environments for students. This passion has led me to pursue this study and informed my approach in its design and implementation.

Statement of teaching philosophy

In an effort to provide full disclosure, assumptions, biases, and context for how this researcher entered into this study, I have developed and provided my own aspirational intent and statement of teaching philosophy below:

"To educate is to guide students on an inner journey
toward more truthful ways of seeing and being in the world."
- Parker Palmer

I love learning. I am a lifelong learner. I have always been inspired by ~~extra~~ordinary individuals who care deeply about learning and teaching, and who love nothing more than to have a conversation about what matters. I am compelled to be a contribution to and for the world. I want to live in a world where learning and teaching develop individuals to be unstoppable in their worthy pursuits. I want to stir and be stirred. I believe anything can be learned. It is not a matter of talent; it is a matter of desire. Knowledge is not designed to be available to a privileged few. Knowledge is to be shared and valued into a pool of mutual understanding.

I am not alone in this journey. My companions in learning come from every place I can, and cannot imagine. The best learning occurs when those involved are willing to be vulnerable, open to new ideas, and allow for each to influence the other in their collective pursuit of truth. I guide and allow myself to be guided. We all have a responsibility to create a learning sanctuary and laboratory where we can get lost, play, debate, and experiment. Deep learning ensues when improvement and forward progress occurs, and in my personal experience, it has been most often when I have either failed or succeeded.

Good teaching is like collaboratively painting over an existing painting. We very rarely paint on a blank canvas. Each of us has a role and part in contributing to the portrait we create together. We each bring our own unique colors, styles, and tools. Like any work of art, those

who have contributed never really feel as though they, or it, are finished. Each is drawn by the craving to advance and their desire to be imaginative: to construct something original. As with every gallery, the merits, complexity, and value of the art is interpreted by the public, but appreciated most by its owner. Knowledge unleashes opportunity and leads to transformation.

The exchange of ideas and willingness to discover old, new, and better ways of being, move us forward. I respect this process. I act with purpose and intention. I value humor. I value challenge. I work toward my own expertise and mastery while supporting others in their own journey. I walk with and beside others in this expedition of unending discovery. I am committed to relevance. And by relevance, I mean remixing the proven strategies that incorporate good learning and teaching and updating them to be appropriate and fresh for this time, this place, this subject, and these co-participants. I utilize reflection and feedback to discover. I labor to build and expand our collective and shared understanding of meaning – and the meta-theoretical foundations that underpin our thinking. I seek all who are devoted to the learning and development of others. I allow myself to be human and to be influenced by the humanity of others. I call on others to do the same.

I approach learning and teaching with passion, and in this way because it is how I have learned best. But more importantly because it supports current thinking and literature about the best practices of good teaching and it fosters an environment that I want to coexist in with others. These beliefs affect my practice. I have multiple goals for others and myself in this collective endeavor. My goals include co-creating an ethical, student-centered, and conducive learning environment that fosters critical thinking and challenging thought. I share mutual high expectations in performance for others and myself. I aspire for us all to have a mastery of content and knowledge. I know that I wish to learn and work in an environment where care and

compassion, approachability and availability, and listening is shown and felt. I appreciate clear and effective communication and good design that includes scaffolding learning and teaching methods and practices. I take into account others' goals while implementing my own. I aspire to influence others and allow myself to be influenced.

We advance. We grow. We arouse and instigate. We invite others to join. We support. We challenge. We provoke and cajole. We improve. We co-create what is beyond our assumptions and expectations. We inspire. We make an impact. We learn. We teach. We do this together forward.

"Good teaching requires courage—
the courage to expose one's ignorance as well as insight,
to yield some control in order to empower the group,
to evoke other people's lives as well as reveal one's own."
- Parker Palmer

Summary: Method of study

The method of study in this qualitative research study is consistent with well-known and recommended strategies for a good qualitative inquiry utilizing interviews. I have described how I involved participants, utilized sampling procedures, provided demographics, and implemented safeguards in the study. The data collection processes included interviewing and triangulation. Additionally, the data analysis considered factors in a good qualitative research study. Finally, I have provided the context and a description of how my own background and experiences have shaped and informed me as a researcher in this study.

Conclusion

It was the intent of this study to produce a qualitative inquiry of what good teachers do in long-standing, co-curricular, multi-day, undergraduate college and university leadership programs. It was my hope that generating a study of this kind will inform not only this

researcher, the participants, and the organizations involved, but the field of higher education. Ultimately, I desired to identify best practices of teaching to improve the teaching itself and to improve the selection and training of lead facilitators. By doing so, organizations might develop better teachers and produce more impactful programs for leadership education and development, thus improving the program and the impact on student participants in an expanding number of co-curricular, undergraduate leadership programs. While I am unable to control how these results will be utilized in other organizations and programs, as an employee and facilitator for LeaderShape®, I believe LeaderShape® will utilize the results of this study to improve their selection, training, and evaluation of instructors in their long-standing, co-curricular, multi-day, undergraduate leadership program – The LeaderShape® Institute.

Chapter 4

Findings

Introduction

This dissertation explored what good lead facilitators do in long-standing, co-curricular, multi-day, undergraduate leadership programs through qualitative interviews. Instructors in these specific leadership programs that take place outside of the classroom literally impact the lives and learning of thousands of college students every year. Given the significant scholarship about effective teaching in the classroom and the lack of scholarship about leadership programs that occur outside of the classroom, specifically related to teaching, this study was designed based on my desire to explore and explain the collective efforts of good teachers in these unique environments. In order to better understand the role of instructors in these programs, the data was closely examined for what practitioners think and do. This chapter is organized into five sections: (1) description of participants, (2) review of coding, (3) research questions and findings, (4) identified metaphors for teaching, and (5) additional factors cited by participants.

First, the description of participants begins with providing background, involvement, and an understanding of impactful learning and teaching experiences they each have had. Lead facilitators come from each of the four programs highlighted in this study listed in longest-standing order: LeaderShape®'s The LeaderShape® Institute, the North-American Interfraternity Conference's Undergraduate Interfraternity Institute (UIFI), the Association of College Unions International's Institute for Leadership Education and Development (I-LEAD®), and Beta Theta Pi Fraternity's John and Nellie Wooden Institute for Men of Principle.

Second, a review of the coding procedures is provided. A brief description is provided about how lead facilitators were nominated and identified by each organization, how interviews

were conducted, and how the codes were mapped back to each of the original research questions in this study.

Third, findings will be used to provide what qualitative researchers refer to as thick or rich description for each of the research questions in this study. Each of the 27 codes is described in great detail and organized with an individual introduction, descriptions with quotes, and a summary per code under each research question. This provides significant and high-quality insight into how good lead facilitators do what they do, what they value, what they prioritize, and what they aspire to achieve with students when teaching in long-standing, co-curricular, undergraduate college/university leadership programs.

Fourth, lead facilitators were asked what metaphors describe their approach to teaching. They provided 20 different metaphors and insight into their holistic approach to facilitation and instruction. By far, the most commonly mentioned metaphor referred to their teaching as "a journey." This unprompted metaphor was named by two-thirds of the lead facilitators. Their descriptions of this journey are described in greater detail with quotes from interviews that provide greater context.

Lastly, four other important findings were identified throughout the course of this study and emerged from the data. Each serves as a contextual piece or as a foundational understanding about this research and was discussed at length by the overwhelming majority of participants, thus warranting their inclusion. These four findings involve: (1) utilization of a co-lead facilitator model, (2) serving as a small group facilitator prior to being a lead facilitator, (3) lead facilitator's experience with the organization, and (4) belief in their fellow small group facilitators.

Description of participants

The 15 participants in this study brought forth a wealth of knowledge, information, and understanding to their role as lead facilitators in each of the four programs involved. Their unique and diverse perspectives showcase their commitment to teaching and facilitation of long-standing, co-curricular, undergraduate college/university leadership programs. Their experience as lead facilitators is shown below in Table 6.

Each of the four programs studied: LeaderShape®'s The LeaderShape® Institute, the North-American Interfraternity Conference's Undergraduate Interfraternity Institute (UIFI), the Association of College Unions International's Institute for Leadership Education and Development (I-LEAD®), and Beta Theta Pi Fraternity's John and Nellie Wooden Institute for Men of Principle all utilize a co-instructor or co-lead facilitator model.

A lead facilitator can be defined as an individual responsible for managing all aspects of a multi-day institute. Their primary role is to teach and facilitate the large group sessions for the students and small group facilitators. Part of their role is administrative in that they ensure successful execution of all program logistics, either directly or indirectly. In addition to management and teaching responsibilities, lead facilitators serve as part support, part resource, and part role model for the other (small group) facilitators. Lead facilitators conduct on-site training for the small group facilitators prior to the program and coaching in regular faculty meetings. Because each program bounces back and forth between large group sessions and small group meetings, the effectiveness of the programs are, in large part, determined by how the faculty works together and how they collectively provide attention to the participating students.

Table 6

Overview of participants involved in this study

Instructor	Organization that identified them as a good lead facilitator	# of times as a lead facilitator
Instructor A	LeaderShape®	39
Instructor B	LeaderShape®	27
Instructor C	LeaderShape®	13
Instructor D	LeaderShape®	11
Instructor E	UIFI	4
Instructor F	UIFI	8
Instructor G	UIFI	4
Instructor H	UIFI	35
Instructor I	I-LEAD®	5
Instructor J	I-LEAD®	3
Instructor K	I-LEAD®	4
Instructor L	Wooden Institute	3
Instructor M	Wooden Institute	7
Instructor N	Wooden Institute	6
Instructor O	Wooden Institute	3

LeaderShape®

Instructor A

Instructor A currently serves as the Associate Dean of Students for Diversity and Inclusion at a small private liberal arts college. Originally from Houston, Texas, she identifies as a 39-year-old female who is African American, working class background living middle class life now and single. Instructor A received her bachelor's degree in journalism and English and her master's degree in higher education from a large public Midwestern state university. She received her doctorate in social justice education from a large public university in the Northeast. She has worked in higher education at two large public universities and another small private liberal arts institution.

Instructor A has been a small group facilitator for The LeaderShape® Institute and served as a lead facilitator for 39 sessions of The LeaderShape® Institute. Instructor A also personally

has sponsored individuals to attend The LeaderShape® Institute. In addition, she has facilitated many other programs including Intergroup Dialogue, American College Personnel Association (ACPA) Institute for Social Justice, BreakAway Alternative Break, Camp Anytown, and the Iowa Governor's Institute.

Instructor A describes her most powerful learning experience, which occurred in graduate school:

> *In my doctoral program in social justice it was about the fact that there were diverse identities around me. A lot of different racially ability … sexual orientation all those identities were talked about all the time. There was a diversity of people around me. And it was held by the faculty very well. In a sense that, there was a lot going on if there was a fish bowl there was a lot going on in the fish bowl; but the faculty held it well. And it held it by letting us struggle with each other but also a struggle with them. I probably went to that place because we just had our twentieth anniversary of the program. I watched the beautiful mess that is social justice education. Seeing the students in the twenty-year history there together I thought that was a special learning place. I am glad to have had that.*

Instructor B

Instructor B currently serves as Executive Director of Campus Life at a private university in the Midwest. Instructor B grew up as Midwest kid in small town Indiana and identifies a 50-year-old Caucasian male and a partnered father of two children. He received his bachelor's degree in sociology and master's degree in student affairs from a large public Midwestern state university. Instructor B has worked in higher education since 1986 and held positions in fraternity/sorority and student affairs at four other institutions of higher education including three private (two in the Midwest and one in the Northeast) and one large public university (East coast).

He has been a small group facilitator for The LeaderShape® Institute, a small group facilitator for UIFI four times, and served as a lead facilitator for 27 sessions of The LeaderShape® Institute. Instructor B also has served as program coordinator for four sessions of

The LeaderShape® Institute at a private university. In addition, he has facilitated many other programs including IMPACT, the Interfraternity Institute and numerous campus leadership programs including five other college and universities.

Instructor B describes powerful learning experiences in general terms:

> *It's the … there's just this moment when you are in it, that there is this flow that … it just kind of sweeps you away. And you are either so lost in the material or the moment, that you kind of lose all track of what's going on around you, and if someone has taken me to that place, you know, for me, what I would classify as a peak … kind of peak experience, you know, then you start thinking about, what were you doing? What was going on around you? I can't even tell you because I was so in the moment. That's happened as a facilitator and it's happened as a participant as well in things. Well, LeaderShape® clearly it has happened a couple of times. When you just kind of get into that, oh crap, this is really on. Like and it's working and you feel it and you know it and it's all just really good … when you're really asking some really probing questions and people are going, hmmm, I never thought of that before. Then they start talking and then all of a sudden you've kind of sparked something in them that has ignited some … and then you can see the passion of why they are in that space and why they are doing what they're doing and all that kind of stuff.*

Instructor C

Instructor C currently serves at the director of large southeastern public university's leadership center and as an adjunct faculty member in their higher education department. Instructor C grew up in a family of educators, where she very much identifies as an educator, a learner, and a teacher as well as identifies as 41-year-old Caucasian female who is single. She received her undergraduate degree in speech communications from a large public Midwestern state university, master's degree in student affairs and higher education from large public Western state university, and her Ph.D. in college student personnel with an emphasis in leadership development and organizational change from a large public East coast institution. Instructor C is in her 19th year of work in higher education and previously has worked at a small private liberal arts college (in the Midwest) and three large public universities (two in the Midwest and one on the East coast).

She has been a small group facilitator for The LeaderShape® Institute, a UIFI small group facilitator, an I-LEAD® small group facilitator, and served as a lead facilitator for the Wooden Institute once, UIFI three times, and The LeaderShape® Institute 13 times. Instructor C also has served as program coordinator for four sessions of The LeaderShape® Institute at a large public institution in the southeast. In addition, she has facilitated many other programs including the NIC's Future's Quest and IMPACT programs as well as served as a challenge course facilitator at two large public institutions in the Midwest and one in the West.

Instructor C's most powerful learning experience came as an undergraduate student:

> *So one of the most powerful teaching moments that is constantly with me for the multitude of reasons that I can pull out from it, is as a senior on the Union Board. I was extremely frustrated by one of the freshman directors who I thought was just the most annoying, ridiculous, needy director that was just putting me over the edge and I looked at Dorris, and Dorris was the Union Board secretary, who has known me four years. I looked at Dorris. I said, 'Thank God I was never like that' and Dorris just said nothing. I can remember to this day just shocked still standing there looking at her and being like, ahhhh. She just totally checked me, right? Just totally called the question. And I just remember standing there and being like, 'Crap, I was. I was all of those things. All of those and I probably still am. You know?' For me, it was this beauty about people who know you are un-self-delusional about … are we annoyed by the things that we see in others that annoy us about ourselves, about … or all educators? Dorris, the secretary you know, answers the phones. She's not the professors that I had in class for the next three hours. To this day, that's probably one of the most powerful learning moments I've ever … like, just checked me. Just this reflective moment around how dare you judge? How dare you lose sight of who you are? It was just … it was great.*

Instructor D

Instructor D currently serves as the president of a consulting firm. Originally from Philadelphia, he identifies as a 52-year-old African-American male who is partnered. He received his bachelor's degree in therapeutic recreation and music from a small public institution in the Northeast, and has two master's degrees – a master's degree in divinity from historically black college in the South and a master's of science in higher education from a large public institution in the Midwest. His received his Ph.D. in college student counseling and personnel

services from a large public university on the East coast. Prior to the consulting firm, Instructor D worked for one large and one small university on the East coast, and as a consultant for a non-profit organization in the Northeast.

He has served as a small group facilitator for The LeaderShape® Institute and as a lead facilitator for 11 sessions of The LeaderShape® Institute. In addition, Instructor D has facilitated several programs including the Social Justice Training Institute (SJTI) and as a full-time consultant and trainer for the past 12 years.

Instructor D's most powerful learning moment came for him in seminary graduate school:

> *Yeah, there is one that just really kind of pops right into mind and so great learning and teaching experiences for me are actually those learning moments when you get asked a question and the answer gives you a deeper insight into yourself, into the realities of life. It shifts your thinking from something you thought was true. You thought you had an answer. You thought you had the answer but the question really took you to a different place. I had that great learning experience when I was in Seminary. I think that is one of the places that it stands out most for me, where … we were asked and the one that comes to mind most for me is when my seminary professor asked all of us why were we Christian? And just being in the space of exploring that as a truth for ourselves and then being invited to consider, 'well, no, maybe none of that is true. What if you … how about because your mother was?' And that was this moment of, 'hm.' You know? Enlightenment and fascination and 'really?' and it's been something that has stayed with me for ten years and it's something that I use all the time.*

UIFI

Instructor E

Instructor E currently serves as a director in student and fraternity/sorority affairs at a private institution on the West coast. Instructor E grew up in southern California and identifies as a 39-year-old Caucasian female who is partnered and a mother of two. She received her undergraduate degree in liberal studies at a large public state university on the West coast and her master's degree in counseling/college student services at a small private liberal arts

institution on the West coast. She has worked at a small private liberal arts college for the past 17 years in higher education and fraternity/sorority affairs with a focus on leadership development and community building.

Instructor E participated in UIFI as an undergraduate. She has served as UIFI small group facilitator, twice as a small group facilitator for the Wooden Institute, and four times as lead facilitator for UIFI. In addition, she has facilitated several other programs for three other fraternities as well as one sorority.

Instructor E describes her most powerful teaching moment:

> *Probably the most meaningful teaching experience that I have had has been in teaching our freshmen leadership class. One component of my position at the university is to oversee multiple sections of the class and so being able on two different levels. One in teaching the instructors for those individual sections and then also in teaching the individual freshmen that are in there and being able to create an environment where learning is happening among the participants, not from the instructor to the participants exclusively. It starts always with a level of comfort and vulnerability with one another and the willingness to risk saying something that might be wrong or be perceived as silly by others, to be able to express how they're experiencing the moment.*

Instructor F

Instructor F currently serves as the Chief Executive Officer for a fraternity. Instructor F is originally from Baltimore, Maryland and grew up Louisville, Kentucky. She identifies as a 34-year-old Caucasian female who is partnered. She first attended a small private liberal arts college, later studied overseas, and ultimately received her bachelor's degree in theatre and business from a private Midwestern university. Instructor F received her master's degree in college student personnel from a midsized Midwestern state university. She worked in student affairs at a large public institution in the South and has been working in fraternity/sorority life for 12 years.

Instructor F has been a small group facilitator for UIFI twice and served as a lead facilitator eight times with UIFI. In addition, she has facilitated several other programs including IMPACT, programs for three other fraternities, as well as programs at four other universities (two in the South, one in the Northeast, and one in the Midwest).

Instructor F describes a powerful teaching moment as a young professional:

> *One of my biggest teaching moments happened when I was the fraternity advisor and some of my guys said something completely stupid and lied about it. I took them aside and said, 'You know, I'm really, I'm angry with you. I'm frustrated. And you could get in serious trouble for this; but I need to know why you'll never do this again.' Instead of screaming yelling, threatening, I gave them the opportunity to learn from it themselves. It's something they said changed them; changed their lives, because it was the first time someone challenged them and said, 'You're going to take responsibility, you need to decide what happens.' And that's part of how I advised students, is making sure they have the choice and making sure they're treated like adults and given the opportunity to grow from mistakes because I think you need that. You need a positive opportunity to learn from bad choices.*

Instructor G

Instructor G currently serves as the assistant director of a university center at a midsized public university in the Midwest. Instructor G is originally from Minnesota and identifies as a 55-year-old Caucasian female who is partnered. Her bachelor's degree is in sociology and social work from a midsized Midwestern state university and she received her master's degree in college student development and administration at another midsized public university in the Midwest. In addition to working in student affairs at a midsized Midwestern state university, she has worked as a vocational rehabilitation consultant licensed by a Midwestern state for an insurance company. In total, she has worked in higher education for 23 years.

Instructor G has been a small group facilitator for UIFI four times and served as a lead facilitator four times. In addition, she has served as a facilitator in numerous other programs

such as the NIC's IMPACT program, Recruitment Boot Camp, a sorority, and for a large public university in the Northeast.

When describing her most powerful past learning experiences, Instructor G says:

> *The best learning experiences that I've had they've all been pretty experiential … they've been opportunities where I've either intentionally or unintentionally been in situations where people have supported and challenged me to grow and to think critically.*

She goes on to talk about other powerful learning experiences are:

> *When I've intentionally placed myself in conversation with peers that have forced me to examine my belief system and forced me to think about what's really important to me, and where my peers have encouraged me to grow and to develop as well.*

Instructor H

Instructor H currently serves as the Chief Executive Officer a small non-profit organization in the Midwest. Instructor H was born and raised in Hawaii on the island of Kauai and identifies as a 46-year-old Caucasian male who is partnered with two children. He double majored as an undergraduate at midsized Midwestern state university receiving bachelor's degrees in public communications/human relations and vocal performance with a minor in journalism. Instructor H received his master's degree in college student personnel from a midsized Midwestern state institution. In addition, he has worked in student affairs at two large public universities in the West. Lastly, Instructor H has previously held positions at a non-profit as the director of leadership education coordinating and developing curriculum for UIFI and as a senior leadership executive.

Instructor H has been a small group facilitator for UIFI four times. He has served as a lead facilitator for I-LEAD® once and for UIFI 38 times. In addition, he has facilitated several other programs provided by the NIC including IMPACT and Future's Quest.

Instructor H describes his most powerful learning moment early in his professional career:

> *My personal learning moment, I think, came as a young professional that was based in my own development but existed in an external dynamic. It was when I learned to trust my instincts and my gut. It related to my own evaluation from my supervisor where pieces of information that were being funneled to me didn't make sense to me and I couldn't put two and two together, and I think prior to that I would have emotionally reacted, fumed, gotten mad … but something in that moment helped me to understand that a rational argument where two and two equal four was going to work better in my challenge to this than to say, 'Marianne, I disagree.' I was able to prove myself via that process, and successfully challenged what was going on in that evaluation and I've taken that with me into those supervisory-type relationships ever since. I think I supervise better as a result, as well.*

I-LEAD®

Instructor I

Instructor I currently serves as an education director for an association that serves student affairs in higher education. He grew up in Utah and identifies as a 35-year-old Caucasian male who is partnered. Instructor I received his undergraduate degree in political science from a large public institution in the West. He went to and graduated from a large public Midwestern state university with his master's degree in higher education and student affairs. While working at the association in his current role, he develops and manages the curriculum for the I-LEAD® program. In addition, he has worked at a large public institution in the Midwest, as a store manager for two company stores, and as a court clerk for a state in the West.

Instructor I participated in The LeaderShape® Institute and I-LEAD® as an undergraduate. He has been an I-LEAD® intern and small group facilitator and served as a lead facilitator five times. Additionally, he has facilitated several other programs and workshops, including association programs for international and regional conferences, for three other

universities including two large public institutions in the West and one large Midwestern state university.

He describes his powerful learning experience as attending I-LEAD® as an undergraduate student:

> *My experience as a student at I-LEAD® was the turning point for making that decision to go into student affairs. The reason for that for me was, I had thought as an undergraduate that my career path would be to go to law school, to become an attorney and I was working as an undergrad at the courthouse and watched day in and day out attorneys and clients and judges come in and come out and it was fine. I was a clerk, I did what clerks do, but when I went to I-LEAD®, and when I watched the facilitators, in particular, working with student working with us, teaching us, helping grow, I think that was the first time that I ever understood what job satisfaction might look like for somebody. Those facilitators I felt really just overwhelmingly that they loved what they did and I wanted to be a part of that; that totally changed the outlook of what I was going to do with my life and I learned a lot about myself and about the leadership principles from that.*

Instructor J

Instructor J currently serves as the assistant director of the university center & student activities at a private institution in the Midwest. She grew up in Missouri and identifies as a 33-year-old Caucasian female who is partnered. Instructor J received her bachelor's degree in international management and a minor in German and her master's degree in media communications with an emphasis in marketing and event planning from a large private Midwestern university. In addition, she has worked at a local area hospital.

Instructor J has been an I-LEAD® small group facilitator twice and served as a lead facilitator three times. She has facilitated several other programs including programs for a large private Midwestern state university for emerging and advanced leaders, Strengthsfinder and Strengths based Leadership for a university center, student affairs division, and other various programs.

Instructor J describes a powerful learning experience as serving as a small group facilitator at I-LEAD®:

> *I-LEAD® for me, was definitely a turning point … going to I-LEAD® as a facilitator, you first go for three and a half days and learn the curriculum. The facilitators learn the curriculum and then you can teach it to the students and go through it with the students; having that opportunity to first be a student and then be the teacher was really impactful for me because it gave me the time that I needed to reflect on everything that we were doing and to really absorb it … having that time to really synthesize all of that information all at once and you're there and it's you're just surrounded by it and everybody's kind of on the same page and it really … that first time at I-LEAD® really was kind of what solidified everything for me, and I don't know that it was, I can't necessarily point to one person or one activity that did it; but it was just that opportunity to be both the student and the teacher as well as kind of being encompassed by that idea and that feeling that really had a big impact on me.*

Instructor K

Instructor K currently serves as a senior director in capital planning at a large public university on the West coast. He grew up in Winchester, Virginia and identifies as a 39-year-old Caucasian male who is partnered. Instructor K received his undergraduate degree in education from a large public university on the East coast. He received his master's degree in higher education from a large public university in the West. Additionally, he completed his Ph.D. in higher education administration and finance from a small private liberal arts college on the West coast. Instructor K has served as the I-LEAD® Coordinator for three years. Before working at a large public university on the West coast, he worked in student affairs and higher education at two other large public institutions on the West coast.

He has been a small group facilitator for I-LEAD® five times, served as a lead facilitator four times and was on the curriculum committee for the program for three years. In addition, Instructor K has presented leadership workshops at regional and national conferences for the National Association of Campus Activities (NACA), Association of College Unions International (ACUI) and National Association of Student Personnel Administrators (NASPA).

Instructor K describes his first best teaching experience as undergraduate:

> *The best teaching experience I had, I had as an undergraduate student where I was in the center for new students and we had the typical freshman program where you're linked with a faculty member and a student and faculty member co-teach. That was the first time where I really got excited about watching kind of the development students and their growth. Through that experience it translated obviously into other you know leadership opportunities at my undergraduate institution where I became the trainer of the trainers; and that's really where it sparked, for me at least, an opportunity to see the growth and see the impact you can make on a campus. For me, I was kind of out of it in high school, and for college it all kind of clicked. I believe strongly in fit and my undergraduate institution was a fit for me. It was what I needed both academically and co-curricular aspects of college life … the stars aligned in college for me and so I never wanted to leave afterwards. That was the first experience that gave me the inkling that I could do this for the rest of my life.*

Wooden Institute

Instructor L

Instructor L currently works in fundraising for a fraternity foundation. He is from and grew up in Kentucky. Instructor L identifies as a 39-year-old Caucasian male who is single. He received his bachelor's degree in marketing with a minor in communication from a large public institution in the South. He received his MBA from a public university in the Midwest and graduated from an executive leadership program at an elite private institution in the Northeast. Lastly, Instructor L previously has held positions at a small non-profit organization and a fraternity as the director of expansion and leadership programs, founding, developing, and coordinating the curriculum for the Wooden Institute.

Instructor L has been a small group facilitator for two sessions of UIFI and once as a lead facilitator. He has served as a lead facilitator for three sessions of the Wooden Institute. In addition, he has facilitated several other fraternity programs, hundreds of student-centered workshops, and done various speaking engagements on college campuses throughout North America.

Instructor L describes is most powerful teaching moment:

> *The first thing that came to mind actually and ironically was leading the Wooden Institute … one of the things in the terms of teaching or facilitating that was most impactful was when we, our organization, launched the Men of Principle Institute. It was during the training of the small group facilitators, or the chapter facilitators, the wow factor when we were about to launch into day one; the recognition of talent, I had, I can still remember the moment where we were and I can remember the wow factor when I realized that no one was going to be able to do this on their own. And that it was the team of assembled talent that was going to bring to life this program for whatever; however many people it was that were graduating. I can distinctly remember being in awe and also feeling somewhat vulnerable but also in a secure way; that a lot of people are going to bring this to life. It was through assembling other talented people of the teaching that was about occur, was a huge teaching related moment for me; that I, as an individual, wasn't going to teach seventy-five people for five days. I guess you could try it, but probably would be much more successful if there were other people's and differing varying teaching approaches facilitation approaches.*

Instructor M

Instructor M currently works in fundraising for a fraternity foundation. He is from Illinois and identifies as a 33-year-old Caucasian male who is partnered. Instructor M received his bachelor's degree in mathematics education from a large Midwestern state university and his master's degree in human resource development from private university in the Midwest. He has worked his professional career for a fraternity and has served as a leadership consultant and as the director of leadership development where he helped to write the curriculum and coordinated the logistics for the Wooden Institute as well as other organizational leadership programs.

Instructor M participated in both UIFI and the Wooden Institute as an undergraduate. Additionally, he has been a small group facilitator for UIFI and the Wooden Institute as well. He has served as a lead facilitator for UIFI once and for the Wooden Institute seven times. Instructor M also has been a facilitator for several other campus and interfraternal programs including the NIC's IMPACT program.

Instructor M describes his first powerful teaching moment in high school:

One of the first experiences I had teaching was … I was a sophomore in high school. It was my favorite class; it was geometry. I had a really good relationship with our teacher and he liked our class. I made the comment one day, just a joke, and said, 'can I teach the class tomorrow?', just to kind of be funny, and he said … sure! So I had my little oh crap moment I guess, of … oh, he said 'yes.' So I had to prepare the lesson for the next day. He let me see his notes, and the next day, I taught the class. It was a pretty cool just opportunity for me to not only do it for the first time but also do it among like peers. The class gave me a big round of applause and whatever, but it was still, looking back I think, a first attempt of me really getting my feet wet for what education was like. Also, not just in the moment but all the stress and the nerves that come up and all the prep work that you have to do to make sure that you're ready for that moment, you don't just wing it, right? Pretty powerful for me because I remember looking back at that moment later on in college when I made the decision that … hey, I wanted to be in education. I won't forget that one.

Instructor N

Instructor N currently is a stay-at-home mom. She grew up in Missouri and identifies as a 35-year-old Caucasian female who is partnered with two children. Instructor N received her bachelor's degree in journalism from a large Midwestern state university and her master's degree in college student personnel at a public institution in the Midwest. She has worked in higher education for 10 years at three institutions in the Midwest as well as serving as a traveling consultant for her sorority. In addition, she has been an active volunteer with two other fraternities, Junior League, the Association of Fraternity/Sorority Advisors, and the Association of Fraternal Leadership and Values.

Instructor N participated in UIFI as an undergraduate. She has been a small group facilitator for The LeaderShape® Institute, a Wooden Institute small group facilitator two times, and a small group facilitator for UIFI five times. Instructor N has served as a lead facilitator once for UIFI and The LeaderShape® Institute as well as for the Wooden Institute four times.

Instructor N describes two powerful learning moments, the first being attending UIFI as an undergraduate:

My experience at UIFI, by far was probably the most significant and intense psychosocial learning experience for me away from a textbook, and I think that has a lot to do with the immersion that's created in that environment.

And the second becoming a parent:

But I would say the, the runner up is probably the first three months of parenthood both times. And again, I think it has everything to do with the immersion experience of being in the moment and facing something you've never encountered before and trying to figure out how to navigate that and how to make sense of it, but the experience, both of them, UIFI and the beginnings of parenting, knowing that you walk away from whatever that immersion was with things you will use for the rest of your life, whether you knew that going in or not, but they're both, different context, but very similar learning curves.

Instructor O

Instructor O currently serves as an organizational development specialist for a company in the Midwest. He is originally from Louisville, Kentucky and identifies as a 29-year-old Caucasian male who is partnered. Instructor O received a bachelor's of science in history education and a bachelor's of arts in cinema & photography at large Midwestern state university and his master's degree in learning and organizational change from a private institution in the Midwest. In addition to traveling as a senior leadership consultant for his fraternity, he has worked in higher education at a private Midwestern university and as a leadership and organizational development analyst for a large corporation.

Instructor O participated in the Wooden Institute as an undergraduate both as a participant and an intern. He has been a small group facilitator for UIFI twice and served as a lead facilitator for the Wooden Institute three times.

Instructor O describes his most powerful learning was connected to a particular individual who served as his instructor for a program with a fraternity:

I … kind of default to an instructor to a person … Dipper DiPaolo to me was just someone was just a phenomenal presenter, instructor, facilitator. His style and his delivery was something when I first started to see him, I actually saw him for the first time as a freshman in college, this was like 2001 and I was just really blown away by his

delivery. I still remember his message that day when I was a freshman in college over 10 years ago. That's a testament to his ability to just make things stick and to really grab you, often by the heartstrings, but a lot by the head as well. So anytime I've seen I present or facilitate I think his message has just been really – impacting, calming – so I've tried to emulate his delivery, his approach. I just learned so much from watching him and just the way he takes pause and just what he says. He's not as much as a facilitator and I don't even know if he'd call himself an instructor per say, he's more of a presenter; but he does engage the audience … whenever I have the most breakthrough learnings it's got to be from something he's presenting.

Summary of the description of participants

From the 15 participants, seven currently work at higher education institutions, five from non-profit organizations, one owns their own consulting company, one works in corporate, and one as a stay-at-home mom. They range in age from 29 to 55. All have undergraduate degrees and master's degrees (13 master's degrees in higher education, one with an MBA, and one with a degree in organizational behavior), with four holding terminal doctorate degrees, and one having an additional master's degree in divinity. Eight are male and seven are female. The participants self-identify as Caucasian (13) and African-American (2) and twelve currently are married/partnered and four have children. Participants collectively have attended the institutes being studied a combined 232 times: seven as undergraduate participants, 14 as small group facilitators, and all as lead facilitators. Each participant had been a lead facilitator at least three times with the most experienced lead facilitator serving in the role for 39 programs. The mean number of sessions served as a lead facilitator was 11.47 and the median was 6. All have participated and facilitated many other additional programs that were not included in this research including teaching undergraduate courses.

Review of coding

This study incorporated purposeful sampling and snowball or chain sampling procedures were used to obtain information-rich cases. Each of the four organizations was asked for their

expert nominations of their best lead facilitators (instructors). The organizations internally determined whom and provided the rationale for how they select their best teachers. A nomination criterion was not provided to the organizations in advance so as not to bias their selection of good lead facilitators.

Three of the four organizations provided several possible lead facilitators who met their criteria and might have been willing to participate in this research. Given the larger list of potential participants from three of the four organizations, each of the three organizations who provided more than 10 possible participants was asked to further narrow their initial list. Specifically, these three organizations was asked to provide an "A" and a "B" list, "A" being their best of the best lead facilitators.

Participants were identified, contacted, and 15 chose to participate in this study. Participants were interviewed twice with an initial and then follow-up interview. Initial interviews were conducted in person or over Skype and follow up interviews were conducted over the phone. The interviews were transcribed, read, and open coding was done by hand. Open coding attempted to put the comments into themes. For example, the comments from participants about presentation and delivery were grouped in the expert presentation/delivery code. Ultimately, the 1,328 applications (occurrences) of codes fell into 27 unique codes (themes) that were identified from the 15 interviews. This resulted in the following breakdown: 11 codes (798 individual mentions) mapped to the literature about good teaching in the classroom, six codes (198 individual mentions) mapped to my early research project about student perceptions of good lead facilitators, and 10 additional codes (332 individual mentions) emerged that were identified by the lead facilitators themselves from this study. These codes (themes) became the foundation for the framework building process.

The codes were reviewed and confirmed by an external auditor between the initial and follow-up interviews. Each of the 27 codes was mapped back to my research questions in this study. The primary research question guiding this study is: What do good teachers do in college/university multi-day, one-time, co-curricular leadership programs? Six sub questions, derived from Bain's (2004b) study, were asked of teachers indicated to be excellent:

1. What do good teachers know and understand?
2. How do good teachers prepare to teach?
3. What do good teachers expect of their students?
4. What do good teachers do when they teach?
5. How do good teachers treat students?
6. How do good teachers check their progress and evaluate their efforts?

The follow-up interviews were conducted to verify and confirm the coding, findings, and framework. All follow-up interviews were conducted over the phone. Each application (occurrence) of the codes were taken from the transcribed interviews and categorized by similar theme under each of the 27 codes. This information is provided below in my research questions and findings.

Research questions and findings

A frequency distribution table provides an overall understanding and breakdown of the application (occurrence) of each code by all of the 15 participants from the four programs in this study in Table 7 below. The codes are in priority order based on the frequency they were mentioned in the transcribed interviews and then were confirmed and verified by an external auditor (see Appendix F). The four programs are listed at the top (left to right) in order of instructors for The LeaderShape® Institute, UIFI, I-LEAD®, and the Wooden Institute.

Table 7

Application of Instructor Codes: Organized by frequency distribution and ranked by code from lead facilitator

Codes	LeaderShape®				UIFI				I-LEAD®			Wooden				Totals, Rank & # of 15 Instructors		
	Instructor A	Instructor B	Instructor C	Instructor D	Instructor E	Instructor F	Instructor G	Instructor H	Instructor I	Instructor J	Instructor K	Instructor L	Instructor M	Instructor N	Instructor O	Totals	Rank	# of Instructors
Student-Centered	22	12	12	15	16	17	12	12	7	11	14	8	13	13	12	196	1	15
Conducive Learning Environment	13	3	5	8	11	10	4	10	11	6	7	3	5	13	6	115	2	15
Expert Presentation/Delivery	4	8	3	8	6	8	7	11	9	2	10	10	6	7	14	113	3	15
Care & Compassion	15	4	4	7	16	9	6	6	7	5	4	5	11	4	1	104	4	15
Personal Disclosure/Vulnerability	3	7	5	12	7	4	3	3	5	1	6	4	7	2	2	71	5	15
Passion/Enthusiasm	10	10	4	6	5	5	5	5		1	4	5	2		6	68	6	13
Critical Thinking	5	1	1	7	7	6	2	4	2	1	8	1	6	8	2	61	7 (tie)	15
Master of Content/Knowledge	1	4	3	6	3	3	4	4	6	2	5	5	2	7	6	61	7 (tie)	15
Role-Modeling	5	1	5	8	7	7	3	1	5	1	3	1	5	2	3	57	9	15
Fair/Timely Feedback	4	2	2	4	4	2	4	5	5	1	2	2	11	4	1	53	10	15
Reflection	1	4		5	3	2	2	4	1		9	4		6	2	43	11	12
Authenticity	9	3		8	2	7						7	1	3	2	42	12	9
Availability to Students	1		4	1	4	4	5	3	4	5	2	1	1	2	3	40	13	14
Integrity/Ethics		2	2	5	1	6	3	4		1	1	2	5	2	1	35	14	13
Listening	3	1	3	1		6	3	3	2			1	4	3	3	33	15	12
Experiential Learning		1		1	3	1	3	2	3		5	2	2	1	4	28	16	12
Questioning	4		2	2	1	2	3	1	2	1	3	1	2	2	1	27	17	14
Managing Diversity	3	1	2	5	1	1	1		4		2			2		22	18 (tie)	10
Humor	4	2	1		3	2	2	2	1	1	1	1			2	22	18 (tie)	12
Trust	1		1	1		2	1		4	3	2	1	2		1	19	20 (tie)	11
Energy	3	1		5	1	1		2		2	3		1			19	20 (tie)	9
Flexibility		1				2				2	6	1	1	5	1	19	20 (tie)	8
Well-Organized		1		1	1		2	2	1		1	1	3	2	1	16	23 (tie)	11
Clarity & Effective Communication	1		2			1	2	1	1			4	1	3		16	23 (tie)	9
Good Course Design	1	1			1		1	3	1	1	3	1	1	2		16	23 (tie)	11
Approachability						3		1	2	2	1	2	2	2	1	16	23 (tie)	9
High Expectations		1	2			4		1			1		1	2	4	16	23 (tie)	8
	113	71	63	116	103	115	78	90	83	49	103	73	95	97	79	1328		

* Organized by frequency distribution (# of times mentioned by lead facilitators) and ranked. Total number of instructors = 15.

The abovementioned instructors are shown on Table 6 as Instructor A, Instructor B, and so on. A total of fifteen instructors from the four programs broke down in the following way: 363 applications (occurrences) of codes (more than 27%) were by four lead facilitators for The LeaderShape® Institute, 386 applications (occurrences) of codes (29%) were by four lead facilitators for UIFI, 235 applications (occurrences) of codes (over 17%) were by three lead facilitators for I-LEAD®, and 344 applications (occurrences) of codes (over 25%) were by four lead facilitators for the Wooden Institute.

The three columns on the right-hand side provide additional information and perspective about good lead facilitators in long-standing, co-curricular, multi-day, undergraduate leadership programs. Each code is ranked (2nd column) by frequency distribution and total application (occurrences) of code (1st column). The 3rd and last column on the right provides the number of instructors (out of a possible 15) that were coded for that code at least once. All codes were applied for a majority of the lead facilitators; the lowest ranked code at least had eight of the 15 lead facilitators referring to it in their initial interview and all 15 instructors mentioned nine codes.

Research Question #1: What do good teachers know and understand? (Codes 1 – 8)

Eight of the 27 codes fall under the research question of what good teachers know and understand: Expert Presentation/Delivery, Role-Modeling, Authenticity, Integrity/Ethics, Experiential Learning, Managing Diversity, Flexibility, Good Course Design. The codes are ordered and prioritized (highest to lowest) based on their frequency of application (occurrence) from the 15 transcribed interviews with good lead facilitators from the four programs in this study.

Code 1: Expert Presentation/Delivery

The Expert Presentation/Delivery code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it also was highlighted by the lead facilitators themselves. This led to 113 applications (occurrences) of this code, ranked 3rd by number of mentions by lead facilitators and all 15 leads identified its importance.

Careful review of applications (occurrences) of the Expert Presentation/Delivery code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators take the lessons and help students apply it in their context. They help students relate content to their personal stories and experience. They use stories and storytelling to effectively make and articulate their point.

  Whether it's bouncing around the room, inflection of your voice, the use of different props; storytelling I find incredibly important. And that's not going to be surprising, most of us learn from tribal ancestry, of the handing down of stories. When you tell that story to reinforce a point, that's what they remember. Not the theory. (Instructor L)

  You have to do a lot of soul searching about what is the purpose of me telling this story? And if it's about you telling a story for drama, as opposed to making a point or whatever, then that's now about you. (Instructor B)

  I read this great line somewhere … about how many times do you tell stories and that it's still a really good story if you're still learning from it. But every time you tell it, if you aren't learning something new from it, then you should move on to a new story. I think about that sometimes in the stories I tell throughout teaching and in the leadership in the Institute … how am I continuing to learn each day and use stories from each day versus ones that I think have a really good bow on top or … if I'm not learning from it anymore … I'm falling right back into the preacher, uncool – I mean as a role model for you, how cool I am. I try to think about that. I think I error on that a lot. The desire to be liked, versus create space. (Instructor C)

- Good leads have a knack for and practice the art of asking questions to augment their presentation; they have enough experience to use questions skillfully and they are able to predict and prepare for the tricky parts.

I try and ask questions and not provide answers. I try and have them come up with questions. I definitely use personal stories and invite them to use personal stories to engage in discussions; especially about leadership or service or development of self … that's really the way that I try and keep them engaged and keep them thinking about the experience that we're going through. If they can translate or … if they can see a part of themselves in … something that I say or someone else says is a similar experience to what they have … I think they resonate better with whatever topic we're on. If I can connect that to them personally and it's not just a concept that's out there; a thing that that person over there is doing … I think that that's more powerful. (Instructor K)

I think trying to identify where some of the critical learning moments can happen is important and I … try and prepare in advance some of the processing questions that I might ask in the in the moment just so that I can be prepared. (Instructor I)

I would say that it's the seeking to understand. It's the sharing and asking questions. It's the showing up in real-time examples, using myself as an instrument, examples in my own life that are … touchable for people and tangible in real ways. I would say … when there are divergent perspectives and opinions or ways of seeing something in the room, I invite and try to create the space for folks that hold multiple truths and to hear each other's perspective. Especially if it really is a perspective conversation and so that … there can be learning on both sides and that I am not put a hierarchy on the perspectives. (Instructor D)

- Good lead facilitators are aware of and design their instruction for multiple learning styles. They deploy various teaching techniques that incorporate different learning styles to allow everyone to be engaged. By approaching their teaching in this way at it allows for students to remain engaged with them.

  I process information really fast. Example, person A said this. Person B said this. Person C said this. I can tie those three things together and get my transition. I can pace a group very well. I don't let them get out of the gate too fast but I also don't let them drag behind. I think today, I'm a better manager of drama. In fact … I anticipate it to the point where I can prevent it … I couldn't do twenty years ago because I didn't have the life skills. I can attend to … the word character is coming to mind, but … to the various kinds of learner. I can attend to multiple of them. (Instructor H)

  I really look at who is participating and who isn't. I try and pick up nonverbal cues from people. I watch that entire room the entire time. I was the student all though my career that was raising my hand saying "Ooooooo" and so I typically understand those people pretty well and at the same time I admire and truly appreciate the people that are sitting there that are quieter and a little more introspective because nine times out of ten they've got the answer … they've got some little jewel of knowledge that if they articulate it, because their internal processors, they're going to … really … have a wow moment. I try

and adapt my presentation style to make sure that all those individuals are engaged. (Instructor K)

How do I as a facilitator make sure that we still have them engaged? Maybe that's a change in where I am standing, facilitating. Maybe that's being aware that this is going to be a more interactive type time for us, more of where I am drawing on the audience as the participants experience … that's where you start to see in their eyes … people kind of tuning out and zoning out … I think anything you can do to keep them engaged is critical. (Instructor E)

- Good leads recognize their responsibility to be exceptionally good as a teacher and it includes instruction to their students and fellow facilitators. They alter their teaching and facilitation approach as needed to drive their point home.

  We're very intentional about presenting information in ways that we think they will hear it and learn it and be most receptive to learning it. (Instructor N)

  I use my eyes. If I know that you have a response, I apparently have … and we've had an emotional connection or some kind of connection, I can look at you and I guess it gives permission for people to talk. So that's a method. I use my voice and the sound of my voice. Apparently … I'm the kind of person that if I'm making a huge point, I have gotten quiet, because my normal … and I use that intentionally to make people lean in and pay attention rather than getting louder. I sometimes use visuals … I physically move about the room. I always stand and I rarely facilitate multiple sessions from the same place. (Instructor H)

  I just … have command of the room. I can annunciate; I can project my voice. I feel like I have good animated body language so I can move about the room and I can … own the space. (Instructor O)

- Good lead facilitators are intuitive. They pay attention to the group dynamics and know how to utilize these clues to guide their approach.

  I've always paid attention to those subtle cues in the group. Who's the alpha male in the group of students that might be derailing the conversation, or who's the student in the group who is acting out and trying to get attention, and why are they doing that then? What else is going on there and how do you have those deep conversations? (Instructor G)

  I'm also paying attention to what's the context of the time that I'm engaging, where the students are at that moment, how much of this can they take in, is there a way that I need to tweak this so that I can get the spirit of the message because they don't have enough energy left in them to take in the whole message? Or … is the energy really good and I

can … kind of go full hog with this thing. I'm listening for all of that. I am being really present with the students and always checking in around the fact that they're getting what I am trying to convey and having them say more about how they are getting it, sharing examples. 'OK, how does this come alive for you?' 'Where have you seen this?' 'How is this familiar?' Off the theory, off the model, off the framework, into your life. And so that's what I do. (Instructor D)

Sometimes it is about scanning the room and trying to pay attention to faces. I am not trying to pay attention and try to get everyone's faces looking the certain way … I am looking for markers to then say, 'Is this making sense?' I am checking in with folks, I'm checking in with the group … and saying, 'is this making sense to folks?' But verbally checking in and trusting that they will say, 'no' or 'we are all good.' (Instructor A)

- Good leads are willing to separate themselves from other distractions for the sake of the institute. They are focused and present – whether it's time away from family, partners, friends, and/or work – they make sacrifices and do it because they believe in the purpose of the program. Good leads are so focused, so present, that they work toward becoming selfless; they are fully present in order to be absolutely engaged in the task of educating participants.

  I have to be in the moment. If I'm not … they're gonna hate what we're doing and they're not going to learn anything. It comes back to being my best, being focused and having a plan of action, but also not treating it like it's a script. I will not read something from top to bottom because if I'm reading I'm not paying attention to them. I have to be so familiar with it that I can see when they're not getting it and by them I mean: the audience, the students, the group that I'm with small or big. (Instructor F)

  Thinking back to one particular experience where I had a chunk of really heavy curriculum, and it was my proudest moment as a facilitator. I framed the whole thing because I had been set up by the co-lead to say, that every other UIFI where this curriculum has been presented it's fallen flat. It just … we're not hitting the ball out of the park we've got to try something different. And so I set that whole experience up as 'OK you guys here's what you're going to get. You're going to get a mini course in Kotter's theory on change, and when you really walk out of it you really will have taken a master's level of class. And so I need you to be fully engaged,' and we hit that curriculum out of the park. (Instructor G)

  So, the nurturing, the challenging, I'm glad you're asking about that because I think a great facilitator has to have those, and while it's an unrealistic expectation for some of our first time facilitators, in my mind if you're good enough to be asked to come back, you better bring it on. (Instructor F)

- Good lead facilitators make significant connections with students. Through sharing and changing the routine they help facilitate breakthrough learning for students.

  I think it's easy for them to see me as someone who's either lived through what they've lived through, or someone that's really on their level, because what I'm sharing with them is a real experience I had, which then is something that they feel that they're having as well. I think that gives me that credibility. I think that's when I'm at my best. (Instructor M)

  That might be one of the most important things about the entire experience is when you make that transition to being a real breakthrough, challenging experience for them. (Instructor O)

  I think that on these multi-day programs, students start to find the routine in it, and that routine again can be dangerous if it's not challenged appropriately, so I think that in the middle of a program like this you have to have something that changes the pace and changes that routine; changes the expectations. (Instructor I)

- Good leads are good because they are knowledgeable. They are competent in multiple subject areas. They know how to balance their knowledge with giving students what they need.

  Demonstrate excellence and competence in all aspects, so that there's no doubt that you can do it. (Instructor H)

  I live what I teach … I think that's one of the things that makes me good. That it's not just taught from an academic or book learning. It's taught from a lived learning and experience place. Many of the examples that I share are from my examples as a leader and what I've experienced and what I've learned and continue to learn as a leader and as I continue to lead at different levels and in different spaces. I think the other thing … that makes me good is that I'm willing to say the unsaid. I'm willing to create an uncomfortable space for the purpose of learning. So when I say create an uncomfortable space, I'm willing to say the things that folks aren't normally willing to say because they're afraid that people might be uncomfortable, and I don't think discomfort is a bad thing. I think discomfort is a part of growth and I'm not talking about creating trauma, but I am creating dissonance and maybe some places where folks might not feel like they would ever … anybody's ever said that aloud in a room before. (Instructor D)

  I can give them the answer that they need … or talk in the way that they need me to tell them the answer or give them the next direction that that will make sense for them. (Instructor I)

- Good lead facilitators serve as guides – helping students know where they are going – and they lay out a map for all as to how the objectives will be accomplished and ask students to go with them. They combine the goals of program objectives with the student to support comprehension.

  You raise the level of understanding about a concept or construct, that is more than the individual or individuals would have known prior, or it's understood more, than what they would have prior to the teaching. In terms of what do I do when I teach; I try to make it real. I always try to teach the construct or the concept, but then I try to provide examples, or ultimately stories, that help the comprehension of the construct or the concept. Such that they may not get lost in the technical language … but they can surely identify with the general nature of the story or the example. (Instructor L)

  I think teaching boils down to transferring knowledge from one person to another person. So, hoping the students experience the things that they can experience and to know … I don't mean it to sound like this, but to know what I know or to know what the curriculum knows and get the student to know that too. (Instructor I)

- Good leads practice. They have a strong awareness of their own strengths and weaknesses.

  Because of practice … you become excellent. (Instructor H)

  I've practiced. I know what works for me and what doesn't and I am more aware of when I need to push myself … or push the participants and when it's time to step back. (Instructor E)

- Good leads approach each year and each institute as a new opportunity to learn and improve. They prepare in advance so it can be fresh for them and their students.

  I think that every year it's important to take stock in what the curriculum is and every year I feel like I have to look at the curriculum through new eyes. And the minute I allow myself to forget that, or that it gets old or, I start taking it for granted or I get so pissed off that I don't want to do this anymore, that's when I know that I'm not going to be a good facilitator. (Instructor F)

- Good lead facilitators move students along the path from recognizing to applying to internalizing. They make the experience personal for students to whatever extent they can. Good leads make the concepts real in a way that improves students' understanding.

Helping it be real; bringing it to life, a simple analogy, a simple quote, a simple story, can bring a very complex issue through the murkiness for someone, that's where they have that light bulb moment. It's when they can see it, when they can hear it, when they can feel it, that's when it becomes real. So the goal is just to bring the concept or the construct to life in real terms, for comprehension and understanding. (Instructor L)

- Good leads observe the group in a way that allows them to assess how things in the learning environment are going. They work with their co-lead facilitator to balance their shared facilitation.

  I have to be paying attention; so that if something happens and I have to take over, or if something happens and he or she has to take over we're familiar enough and confident enough to teach that. (Instructor F)

- Good lead facilitators apply techniques of good teaching and instruction to help students remember, recall, and retain the learning they have experienced.

  I think it's important to wrap up, sort of summarize the experience, from my perspective: highlighting the high points, and the low points, and the growth points. I think it's important to reinforce what we hoped they got out of it. (Instructor I)

Summary of code 1: Expert Presentation/Delivery

Good lead facilitators take the lessons and help students apply it in their context. They help students relate content to their personal stories and experience. They use stories and storytelling to effectively make and articulate their point. Good leads have a knack for and practice the art of asking questions to augment their presentation; they have enough experience to use questions skillfully and they are able to predict and prepare for the tricky parts. Good lead facilitators are aware of and design their instruction for multiple learning styles. They deploy various teaching techniques that incorporate different learning styles to allow everyone to be engaged. By approaching their teaching in this way at it allows for students to remain engaged with them. Good leads recognize their responsibility to be exceptionally good as a teacher and it includes instruction to their students and fellow facilitators. They alter their teaching and

facilitation approach as needed to drive their point home. Good lead facilitators are intuitive. They pay attention to the group dynamics and know how to utilize these clues to guide their approach. Good leads are willing to separate themselves from other distractions for the sake of the institute. They are focused and present – whether it's time away from family, partners, friends, and/or work – they make sacrifices and do it because they believe in the purpose of the program. Good leads are so focused, so present, that they work toward becoming selfless; they are fully present in order to be absolutely engaged in the task of educating participants. Good lead facilitators make significant connections with students. Through sharing and changing the routine they help facilitate breakthrough learning for students. Good leads are good because they are knowledgeable. They are competent in multiple subject areas. They know how to balance their knowledge with giving students what they need. Good lead facilitators serve as guides – helping students know where they are going – and they lay out a map for all as to how the objectives will be accomplished and ask students to go with them. They combine the goals of program objectives with the student to support comprehension. Good leads practice. They have a strong awareness of their own strengths and weaknesses. Good leads approach each year and each institute as a new opportunity to learn and improve. They prepare in advance so it can be fresh for them and their students. Good lead facilitators move students along the path from recognizing to applying to internalizing. They make the experience personal for students to whatever extent they can. Good leads make the concepts real in a way that improves students' understanding. Good leads observe the group in a way that allows them to assess how things in the learning environment are going. They work with their co-lead facilitator to balance their shared facilitation. Good lead facilitators apply techniques of good teaching and instruction to help students remember, recall, and retain the learning they have experienced.

Code 2: Role-Modeling

The Role-Modeling code can be found as a key focus in by the lead facilitators themselves in this study. This led to 57 applications (occurrences) of this code, ranked 9th by number of mentions by lead facilitators and all 15 leads identified its importance.

All that matters is … we're role modeling, right? (Instructor C)

I feel like I have to be an excellent role model at all times, not perfect. (Instructor F)

I think that … it's an ultimate responsibility for one's self … I can't make you show up differently than you're going to show up, but I can certainly model what showing up looks like physically, intellectually. (Instructor B)

Careful review of applications (occurrences) of the Role-Modeling code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators demonstrate leadership for other facilitators and students. They are always aware of their presence and they understand their role as a facilitator.

  I think anything that I do has to start inside and then go out. I can't manifest it from out here … I try to manifest those things inside and then they live outside. (Instructor A)

  There's just an emotional and physical investment in those institutes that's so much more than a class or a workshop where you've got them for a smaller period of time and I think the best facilitators that I've seen, have been on that whole time … you've got a role model what you want people to do … if you're about building community you've got to … role model it. It's definitely a different experience and a different energy level. (Instructor K)

  When you get the opening or opportunity, you model as many of those steps as you can. If that means you know saying up front, I've never done this before but I'm going to give it a try, if that means being willing to fall on your face and pick yourself back up. (Instructor N)

- Good leads are both educator and learner. They recognize that their success is dependent on what participants put into the experience including the shared expectations of all

involved in the learning environment. Good leads provide a climate of both challenge and support, but in the end, it's about the relationship.

There are ways I can reinforce good … I just don't want to use the word good behavior. It's good modeling of a style or good modeling of a conflict management element we discussed earlier or a good modeling of a leadership topic that we talked about. (Instructor M)

What I do with the students I work with all year round translates to LeaderShape®. That it's about me … showing back up every time … I think too often in our lives particularly as young people we make a mistake, we get ridiculed, and watch something shift around us. Either our parents won't talk to us for a while or as I did … got whippings or something. For me though it's … OK you make a mistake and we may talk about that a little bit, but nothing between you and I will shift. I'm still going to be in a relationship with you. I'm still going to sit with you at dinner (Laughter). I'm not going to avoid you and walk a circle around you and never look you in your eye ever again; and so I think that creates safety. (Instructor A)

Making sure that they understand that … taking time for yourself if you need it … is really … one of the best ways you can model that I think and then call people out when they don't … not easy, but it has to be done. (Instructor B)

- Good lead facilitators don't just turn it "on" for their facilitation. They apply similar facilitation practices to their work life every day.

I've always felt that that's one thing that, I as a facilitator, can demonstrate though my actions. Is OK look here's this old lady standing up here and she's still doing this thing called fraternity/sorority and she seems to be role modeling her values, why can't I, you know? (Instructor G)

I have to say that my preparation is going to sound like a cop out answer … I prepare by living it. I think it sounds like a cop out answer in my head because we are always taught in school you have to prep for a test, you study the night before, you cram, you get everything in order … I can't do that type of prep right before LeaderShape®. Yes, there is the reading through organizing of my thoughts before I deliver the curriculum … but for me it has been about living it. I know I am living it because I live through things. (Instructor A)

I tend to be a … I wear my heart on my sleeve type of person. But I think modeling for them … for me that looks like as a facilitator and as I'm engaging in individual conversation with them outside the context of those sessions, being able to share with them: here's who I really am, here's who really matters to me, here's something that I'm really working on and being able to set that tone for it. (Instructor E)

- Good leads recognize that this isn't personal – they don't make it about them. They know that if they want students to follow them, students won't go anywhere the leads aren't willing to go themselves.

  Ultimately as the lead facilitator you're partly responsible for shaping the experience and if you can't shape the experience and if during breaks you're going to be on your computer or on your phone checking your email, responding to things … you're not fully invested. I think if we asked them to come and turn off their phones and only check their phones during break or check email at night and we want them to be there then I damn well better be there too. You know? And I've been with people, not as leads, but as small group people who I've felt haven't been there. And the biggest loser is the participant but the other loser is the person who's the facilitator. I mean how sad is that? I've got some longevity in this field … I've been doing this for twenty-two years now, and those people don't seem to stick around, I've noticed. (Instructor G)

  To me the process of setting expectations is a group activity. So there are things … some of the flexible things are things that I want people to agree to buy into together. Being on time to a session, being engaged with each other, challenge each other when they feel that something's going on wrong. And this applies to the facilitators and to the students … saying thank you things like that; some of the community guidelines. (Instructor I)

- Good lead facilitators allow for students to "share voice." They allow students to co-create the environment and space for optimal learning and education to occur. Good lead facilitators know that they must prepare students so they feel ready to adopt both roles of teacher and learner.

  I want to create this space for people to do their best learning … so if that means modeling vulnerability, modeling not knowing, modeling good questions, modeling personal self-reflection … I want to create a learning space and so for me those are the kind of things that are important. (Instructor D)

  First and foremost, that we create a space where people can share their voice and that that matters almost more than anything, that that space is everything. I think it's from how we do eye contact. I think it's how we give ownership to speaking. I think it's how we set up the room. I think it's how we truly role model value. It's how co-leads connect with each other. It's where faculty clusters are sitting. (Instructor C)

  For me, modeling, naming that as the kind of environment that we're creating … in terms of setting up norms and ground rules and 'this is a learning space and we will all potentially make some mistakes or not get it right every time or be confused or have a different perspective and that's what this is all about. It's a learning process.' I create

that by naming that, having them help to create and agree to that, but also letting them see it happen and so whether that is letting them see it happen from another participant … they get to see me model it even with me making mistake or working with my co-lead and how we support each other as we do that and/or work as we support someone else in the community. So they get to see it happen. (Instructor D)

Summary of code 2: Role-Modeling

Good lead facilitators demonstrate leadership for other facilitators and students. They are always aware of their presence and they understand their role as a facilitator. Good leads are both educator and learner. They recognize that their success is dependent on what participants put into the experience including the shared expectations of all involved in the learning environment. Good leads provide a climate of both challenge and support, but in the end, it's about the relationship. Good lead facilitators don't just turn it "on" for their facilitation. They apply similar facilitation practices to their work life every day. Good leads recognize that this isn't personal – they don't make it about them. They know that if they want students to follow them, students won't go anywhere the leads aren't willing to go themselves. Good lead facilitators allow for students to "share voice." They allow students to co-create the environment and space for optimal learning and education to occur. Good lead facilitators know that they must prepare students so they feel ready to adopt both roles of teacher and learner.

Code 3: Authenticity

The Authenticity code can be found as a key focus in in institute programs by the lead facilitators themselves in this study. This led to 42 applications (occurrences) of this code, ranked 12th by number of mentions by lead facilitators and 9 leads identified its importance.

I have to be authentic. (Instructor F)

I think that what I do promise is to be present and authentic … in terms of what actually gets said in words, that's what I say. I don't make other promises but to be present and authentic is what I do. (Instructor D)

Wow, they were real too, and you exemplify and demonstrate that at the end by again being very personal and authentic. (Instructor L)

I think really good preparation, being really in the moment and really authentic and shutting up and listening, more than you probably think you should if you have the … idea of being a teacher in your head, is probably the most important stuff. (Instructor N)

Careful review of applications (occurrences) of the Authenticity code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators understand they're a guide, supporter, confidant, and co-pilot at different times. They know that true facilitation and the sharing of knowledge must come from an open, frank, and honest place.

  For me if it's going to be authentically delivered, at least the pieces that I'm assigned, then I have to own it. And I don't mean that in an ego way I mean the wording, the objectives, have to be a part of me. I have to actualize them. (Instructor L)

  'Can I present this authentically?' Are there things here that I … know I'm going to seem awkward talking about, are there things that I don't have personal experience with? Do I get it? If I can't explain it differently than it's written down, I don't feel like I understand it well enough. That's probably the biggest one, is where do I feel like I can't be authentic and then I've got to tackle those. I ask myself where I think the students will get tripped up. Either … where will they be confused, where might they push back? (Instructor N)

  In terms of the teaching, for me, it is do I understand it, and then why does it matter anyway? If I can kind of get my arms around those things … then delivering is the easy part, because again it's just an essence of what you believe and who you are. And we know everyone is just, or most people are just, thirsty for authenticity in this world, and so when a teacher is authentic in their beliefs, it's not reading from cards, it's not reading from a PowerPoint, it's not because the organization made me say this, people see through all that. Yeah, the authenticity of what's being delivered is huge. (Instructor L)

- Good leads know their limitations and understand when they can best contribute. They have had enough experience in other facilitation environments to know their roles and

realize when something works and doesn't and when something is about them and when something is not about them.

That self-reflective piece that I had mentioned earlier, all of it is pulling from what I've seen and then kind of trying it on and saying, 'how does that look for me' OK that felt a little in-authentic, like this is not going to be my go to, OK so let's try something different. (Instructor E)

I had gone session after session after session, comparing myself constantly to my co-leads. I may have just gotten tired. It was just exhausting. Like, oh my gosh, you cannot be this person who lives outside of you. You can only be you and whatever you bring. Why don't you believe what is being said on your feedback? Your feedback … yes has though moments where they say … we wish you would hang out more, but the rest of it is saying you are actually inspiring. Why won't you believe that? I specifically went into a series of LeaderShape® sessions saying – believe your feedback. I don't care if you actually do believe it or not, but read it and go in there knowing that this is how you show up. And stop trying to look out and see what someone else is doing … you were created as a gift in your way. I think you either blow past and blow through that or you get off the exit ramp and you stop. And I think I blew through it and hit the, 'all right, this was one of my contributions to the world and I want to do the best I can' and that way is to be authentic with the curriculum. I don't know what clicked, I don't know if it was a click or about twelve thousand clicks but there was a lot going on. I am just glad it did click. (Instructor A)

I'm most effective when I ask myself … how would I do the session? (Instructor M)

- Good lead facilitators recognize the significance of how they show up in the institute.

They have to be comfortable with themselves first before asking others to follow them.

A five or seven day Institute where I am calling folks to show up and be authentic and real does challenge me … I can't ask people to go where I won't go. Sometimes in a workshop or in a classroom situation, I may not be asking them to do that depth of … depending upon what it is I'm teaching or engaging about. (Instructor D)

I got that I couldn't show up as anyone but myself and so the goals I always set for myself before doing a session is authenticity. I have to show up as me and that has thoroughly impacted my life. I figured out that I don't want to move in my life any other way than authentically. That is where LeaderShape® impacted my life it goes back and forth. Goal first: authentic. And authentic being … with a consciousness about what students need or what the participants or the group needs at any particular time. I am not just showing up and letting it all hang out all the time, but where I am is where I am. I am not going to be something else. That is the conversation I am constantly having. (Instructor A)

My commitment is to show up and be engaged with those that are there. My willingness and ability to come and be fully engaged and fully present with them, I think it supersedes whether that continues beyond as a facilitator that, and maybe this is back to your question on how do you prepare. I think some of it is in largely by disposition for me the willingness to come and share a piece of who I am with them. And when you do that, I don't know if that time extension is as essential, because these are five days where we're going to come and be real and be connected and be authentic. Whether that continues afterward or not, it was meaningful in that space. (Instructor E)

- Good leads know that if you want to be authentic, what you teach must be a self-expression and part of who you are. They know that if it isn't, students can smell it, identify it, and it will ultimately lead to the students not seeing them as credible.

  I think having it in your blood … it's part of who I am. And … to be authentic to who I am I need to get that out. (Instructor B)

  When there is a clear authenticity and understanding of the concept … it seems to come out of you. It just seems to be a part of you. It is part of your essence; it is innate, it's not forced, it's not contrived; it is you. And you're just kind of helping share that with others. (Instructor L)

  It's about living it. I live what I teach, and so I think that's one of the things that makes me good. That it's not just taught from an academic or book learning. It's taught from a lived learning and experience place. (Instructor D)

- Good lead facilitators bounce back and forth of challenging and supporting students throughout the institute. They recognize it takes genuine commitment to play both roles with students.

  It's that balance of challenge and support. I think a facilitator has to have the authentic ability to know when you challenge and nurture or challenge or focus the real versus nurturing and supporting. I think a great facilitator isn't just talking it. (Instructor F)

  I think that when you make that kind of authentic connection it's not a counselor versus patient relationship; it becomes something where they are becoming better, they are challenging themselves so now they start to challenge me and now they start to be my cheerleader, and you have that great relationship and it starts out as student-advisor-mentor. (Instructor F)

- Good leads never underestimate the importance of their co-lead. In order to be successful they must successfully dance together in their facilitation at institutes.

Because the Institute is a co-led space, it's really important for me to show a real and authentic developing relationship with my co-lead. (Instructor D)

It's important to me for my co-lead to understand who they are and that I understand who I am and recognize that … whatever dynamics of power might show up … sometimes that's old lead/new lead. Sometimes it's male/female. Sometimes it's race. Sometimes it's age. You know, dynamics of power … (Instructor D)

- Good lead facilitators show up as real in all facets of their life. They don't shy away from sharing both the good and the bad, it's a part of what role modeling involves.

  It's important to be authentic at the end … I don't say to everybody, you all should apply to be clusters again, or you all should apply to be leads if that's not what I really feel. So it's telling the truth in that way. (Instructor D)

  I'm gonna communicate my full self to you. That I'm not trying to present only the Facebook version of me; that I'm not trying to craft it up to look a certain way. I want you to actually see the whole thing, so that you can continuously think and remember that human beings are not one-dimensional. (Instructor A)

- Good leads take the focus away from themselves. They aren't doing this for ego, though at one point they may have. Good leads lead institutes to positively influence their students and colleagues.

  A lead that's there for themselves and is all about flash and applause has got a problem. I mean maybe … they're really fun and maybe they make for a great week … and maybe they're learning … my gut says … that's not how you get there the most effectively. But I think there's probably a little ego in every lead because at the end of the day you're accepting a position to stand up in front of a lot of people and be the center of attention, but at what point … does that need or desire take over? It seems like the learning … isn't very important at that point. (Instructor N)

- Good lead facilitators know that by intentionally creating dissonance, real learning can occur. They know that in order for this to occur, a safe environment must first be established.

  Sharing authentically can create dissonance for folks that will have them not understand what's going on or question one's motivation for kind of sharing that or engaging that notion or dynamic or from that place. So sometimes I think truth and authenticity can sometimes create that for folks when they're not used to that level of truth and

authenticity coming from … and that level of connection and touching coming from the person who's standing in front of them as the authority, if you will. (Instructor D)

Summary of code 3: Authenticity

Good lead facilitators understand they're a guide, supporter, confidant, and co-pilot at different times. They know that true facilitation and the sharing of knowledge must come from an open, frank, and honest place. Good leads know their limitations and understand when they can best contribute. They have had enough experience in other facilitation environments to know their roles and realize when something works and doesn't and when something is about them and when something is not about them. Good lead facilitators recognize the significance of how they show up in the institute. They have to be comfortable with themselves first before asking others to follow them. Good leads know that if you want to be authentic, what you teach must be a self-expression and part of who you are. They know that if it isn't, students can smell it, identify it, and it will ultimately lead to the students not seeing them as credible. Good lead facilitators bounce back and forth of challenging and supporting students throughout the institute. They recognize it takes genuine commitment to play both roles with students. Good leads never underestimate the importance of their co-lead. In order to be successful they must successfully dance together in their facilitation at institutes. Good lead facilitators show up as real in all facets of their life. They don't shy away from sharing both the good and the bad, it's a part of what role modeling involves. Good leads take the focus away from themselves. They aren't doing this for ego, though at one point they may have. Good leads lead institutes to positively influence their students and colleagues. Good lead facilitators know that by intentionally creating dissonance, real learning can occur. They know that in order for this to occur, a safe environment must first be established.

Code 4: Integrity/Ethics

The Integrity/Ethics code was first identified by students in my early research project about student perceptions of good lead facilitations in institutes but also was reinforced and supported by lead facilitators themselves. This led to 35 applications (occurrences) of this code, ranked 14th by number of mentions by lead facilitators and 13 leads identified its importance.

> *The Institute does call for a different level of authenticity and integrity and vulnerability than some other classroom, workshop settings I'm in. (Instructor D)*
>
> *It's about your integrity and your willingness to do what you need to do. (Instructor H)*
>
> *There's opportunity to create better global citizens, stronger ethical leaders that are going forth to change the world. It starts with that realization of who I am and the power I hold to make a difference in every interaction I have, every conversation I have. (Instructor E)*
>
> *I have fun because I love this. I honest to God feel like I have the best job in the entire world. And when I get to facilitate, I feel really lucky because I get to share my beliefs. There are a lot of times where I don't get to share what I believe, but in facilitation land, I get to take students through the process of learning about leadership or learning about integrity or learning about different values and how to relates to what the what they promised when they signed up for this. Or how it relates to what they sign up for even if they didn't realize what it was at that time. (Instructor F)*

Careful review of applications (occurrences) of the Integrity/Ethics code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators challenge students on their values. They recognize that these students are growing and learning and changing. Good lead facilitators use frameworks and theories to inform how they approach student development in the institute context and they apply proven tactics, such as affirmation, that help participants feel confident that while even if they are "wrong" that it's OK to make these mistakes.

  It's one thing to believe it and to say it among a group of peers that also says … oh, yeah, we believe these things, too, but when the rubber hits the road and you're faced with the actions of your peers back home, your own group or your own chapter on your own campus … inconsistent with what you said you believe and what you're going to fight for,

those are still tough challenges. Those are tough life challenges. It's different than if you were in a company and there were some slightly unethical financial practices and you knew about it and you tell your friends that you don't like it, and you can tell your wife that you're not going to practice those unethical practices, but your job is on the line and you've got to tell your boss you don't agree with, his decisions, his behavior. There are real consequences to that, and those are real tough dynamics to try to navigate. (Instructor M)

I think you constantly have to create the environment by your words and your actions to say it's OK that we're going to talk about this and you have to challenge when appropriate and confront when appropriate. (Instructor G)

I think the other piece on integrity is that, just because you think you know what you would do, you don't know what you would do. You don't. 'Oh, I would never do that!' Interesting. 'So what would you do if your best friend said that I'm cheating on my boyfriend with your girlfriend? What would you do?' … And you're going to be confronted with this the rest of your life and so … how you deal with that is self-awareness, but then part of it also … how do you remain true to who you think you are, and if you haven't done that work, it's a slippery, slippery slope. (Instructor B)

- Good leads live the lessons they're teaching every day. They believe in them, and they practice the skills they teach as they navigate life and work.

  If I claim to be an educator then at some point my only relevancy in the world is how connected I am then to the learning process, and to students. It actually doesn't matter how much knowledge I have. (Instructor C)

  'What values do you live your life by?' And I don't think that we ask that question enough and to me my top three values are family, fun, and integrity. And I try to live my life by those all the time and there are sometimes I have to do things that don't involve those three things but if I get lost I come back to those. (Instructor F)

  We've got to teach … for them to be better people. So what might the look like? That might look like thinking about being more altruistic in terms of service. Or it might look like teaching them about civic engagement, or it might look like teaching them about trustworthiness or truthfulness. Some of those other concepts that become maybe core pillars or core values by which they choose then to live the rest of their life. That's what I think becomes important. (Instructor G)

- Good lead facilitators acknowledge the role that the curriculum plays in engaging students with values-based decision making. They lean on the curriculum to help guide their conversations with students.

At all times it's in context of are we living in integrity with the curriculum? That has not really ever been an issue for me, but … you have to keep it present for those moments. (Instructor C)

For UIFI my first learning objectives come from the curriculum. I've often heard I serve at the discretion of the president but for me I serve at the discretion of the NIC. So my hope is that they understand values and integrity and make good choices. I look at the objectives of the NIC and for UIFI and I am nerdy enough to look at them every morning when I wake up, and every night when I go to bed, because that's what I'm there to do. But of course I want them to have fun and I want them to enjoy the process. I want them to understand that this thing called fraternity that they've joined is bigger than they ever thought it was. And I kind of want to blow their minds a little bit with that. (Instructor F)

- Good leads act as an organizational steward. They recognize that part of being a good lead means always representing the mission and vision of the organization.

  Being sure that I, in as much as it's appropriate, that I am a representation of that organization in a way that would make them proud, making sure that I have a very good knowledge of the nuts and bolts of the organization, that I can speak the language, walk the walk, talk the talk as if I were a member or a part of that organization or paid by that organization to do so. (Instructor N)

- Good lead facilitators have some basic understanding about teaching and facilitation, but they also recognize that they don't know it all – they are comfortable when students challenge them.

  If they see an inconsistency … I need to be called on that. (Instructor B)

Summary of code 4: Integrity/Ethics

Good lead facilitators challenge students on their values. They recognize that these students are growing and learning and changing. Good lead facilitators use frameworks and theories to inform how they approach student development in the institute context and they apply proven tactics, such as affirmation, that help participants feel confident that while even if they are "wrong" that it's OK to make these mistakes. Good leads live the lessons they're teaching every day. They believe in them, and they practice the skills they teach as they navigate life and work. Good lead facilitators acknowledge the role that the curriculum plays in engaging students

with values-based decision making. They lean on the curriculum to help guide their conversations with students. Good leads act as an organizational steward. They recognize that part of being a good lead means always representing the mission and vision of the organization. Good lead facilitators have some basic understanding about teaching and facilitation, but they also recognize that they don't know it all – they are comfortable when students challenge them.

Code 5: Experiential Learning

The Experiential Learning code can be found as a key focus in institute programs by the lead facilitators themselves in this study. This led to 28 applications (occurrences) of this code, ranked 16th by number of mentions by lead facilitators and 12 leads identified its importance.

> *When I think about the best learning experiences that I've had they've all been pretty experiential. (Instructor G)*
>
> *I like to have people have an experience, have some reflection, do some engagement around that, then do some application … just some generalization, then some application and then experience something else … so the learning cycle is experience, reflection and engagement, generalization, application and that keeps going. (Instructor D)*
>
> *You have to have something that changes the pace and changes that routine; changes the expectations. Whether that's an offsite excursion or just a social activity that's not designed, even though it will be, but it's not designed to be processed and things like that; something that changes the pace. (Instructor I)*
>
> *So facilitating an experiential activity is more meaningful, if they are sharing that with someone that matters to them and all of us as people want to matter to someone, at some level, and so part of my goal is how, as a lead, can I create that environment where they matter in the big group and then foster that space, I guess for lack of a better term, for them to matter individually to one another. (Instructor E)*

Careful review of applications (occurrences) of the Experiential Learning code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators recognize students' levels of engagement and diverse approaches to engagement. They identify students' level of engagement and commitment and

determine how to steer those disengaged in the right direction. In addition, they use tactics for students that help to meet their distinctive needs. Good lead facilitators understand theories and frameworks for all students and student subpopulations yet they seek to know the student as a distinct being.

I love that physical aspect of those activities because it allows those group members to fail … I think that coming up with activities that are creative, engaging, that they haven't done before, that someone can't have the answer, that they've got to figure out on their own. I think that really sets the stage early of the type of experience we want them to have. And again I think it so translates later on down as you're talking about more heady topics to be able to reflect back on those things and say 'remember when we were doing this?' 'Remember when we didn't think we were going to be able to accomplish this' and so and so said this and that changed the way we saw it and … gave us the opportunity to have a win. I think that's how I try and set it up. (Instructor K)

I don't believe in scripting out everything. It just depends where we need to be. Something that gets them physically active, something that gets them out of their seat and something that gets them focused. Because, I mean even I do this, after dinner, I have food face or food coma whatever you want to call it and if we're doing something after dinner, not only do we need to focus, we need to get them in a different frame of mind. (Instructor F)

Physically, again my style is definitely not sit and lecture so I like to create some kinesthetic experiences … every one of our activities had some kind of a physical component to it. Whether it was a team builder … where you're working together … we've all seen those … some kind of challenging circumstances that you have to work together as a team, some kind of physical component. (Instructor K)

- Good leads keep students engaged; they monitor verbal and non-verbal messages from students and try to identify how they can work with others to engage students. They monitor and observe who is actively involved, who is not, and then develop strategies to get students involved.

I'm very in to practice. Intellectually that's where I want them to be. Physically I think the whole experience that whole tactile touch, see, smell, hear, taste piece becomes important and can shape them. I think physically trying to get them to be fully present and engaged becomes important in how they touch one another … and what they feel. (Instructor G)

From what I've seen in working … with students I think that experiential learning, that having experiences are some of the best teaching methods so; and experiences can come in a lot of different ways. It can be in a simulation, it could be in an activity, it could be in a real life experience, it could be a lot of different things even down to a conversation that can be experiential. But I think that letting people have an opportunity to hear the principles, see them, and then work with them get their hands messy; and then process … or figuring out what they learned as a result of that is probably the most successful strategy that I find. (Instructor I)

If I really am honest about it … I try and come in things from the side. So if I can have someone draw something we're talking philosophically about … and have them do a physical representation of it, that's right in my bread and butter. If I can do this consensus building activities where there's an activity that's working with people and surviving the Himalayas stuff or the Amazon or whatever … that activity where I can get you engaged in something and then come in on the side later with the ah ha moment or get you to see the ah ha moment that's totally my M.O. … I like when people are having such a good time in the experience that they forget that what their for and then after it's completed or during in some way kind of bring us back into whatever the lesson or that goal or the outcome or learning outcome is that we're trying to gain ... I love that. (Instructor K)

- Good lead facilitators know the curriculum and the objectives but then use appropriate tactics necessary to get to the end goal. They are prepared, confident, and aware of the objectives so that they will get students to the intended outcome even if it looks differently than the prescribed curriculum.

  Being able to even within sections of a session, use multiple teaching styles to hit the learning dynamic. (Instructor H)

  I think engaging lots of different senses, lots of different learning styles, making sure they get up and move around is as important as making sure that when we're concentrating, we're concentrating. (Instructor N)

  I like to use multiple mediums so I always prefer to have some sort of experiential rather than just lecture base interaction and ideally it's something that is engaging the participants. (Instructor E)

- Good leads evaluate students based on level of engagement of the task at hand. They constantly have their antennas up to gauge where the group is and whether the students are on track.

I guess my evaluation is largely based upon observation of the degree to which they've participated and engaged in the learning … and it doesn't mean that their voice has been in every conversation … but what am I seeing throughout the experience that says they are in this process? So whether that is conversations at lunch, or offline, or at break, or in the learning community, the questions that they're asking, the investment that they've put into writing their visions, how they show up in the experiential activities. So … I evaluate them based upon their engagement in the learning. (Instructor D)

Summary of code 5: Experiential Learning

Good lead facilitators recognize students' levels of engagement and diverse approaches to engagement. They identify students' level of engagement and commitment and determine how to steer those disengaged in the right direction. In addition, they use tactics for students that help to meet their distinctive needs. Good lead facilitators understand theories and frameworks for all students and student subpopulations but yet they seek to know the student as a distinct being. Good leads keep students engaged; they monitor verbal and non-verbal messages from students and try to identify how they can work with others to engage students. They monitor and observe who is actively involved, who is not, and then develop strategies to get students involved. Good lead facilitators know the curriculum and the objectives but then use appropriate tactics necessary to get to the end goal. They are prepared, confident, and aware of the objectives so that they will get students to the intended outcome even if it looks differently than the prescribed curriculum. Good leads evaluate students based on level of engagement of the task at hand. They constantly have their antennas up to gauge where the group is and whether the students are on track.

Code 6: Managing Diversity

The Managing Diversity code was first identified by students in my early research project about student perceptions of good lead facilitations in institutes but was also reinforced and supported by lead facilitators themselves. This led to 22 applications (occurrences) of this code,

ranked 18th (tie) by number of mentions by lead facilitators and 10 leads identified its importance.

Careful review of applications (occurrences) of the Managing Diversity code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators appreciate the role that the curriculum plays in helping students understand difference. They encourage the students to have meaningful conversations about their life experiences.

  I would assume that a lot of the curriculums are very similar with a community service piece and a diversity piece and a leadership thread and … kind of organizational theory thread. Those pieces are all really important and it would be interesting to me to see what are the threads that other lead facilitators saw as part of their curriculum. (Instructor K)

  I guess from a baggage standpoint, I think that the most difficulty is having to overcome related to learning during the institute … and I don't know why but always have been, related to their families in origin, and that being such a core part of their identity. Then not wanting to do something contrary to their parents or to what they've been taught all their lives seems to always be the hardest thing for them to overcome; either changing completely their behaviors or understanding that it's OK that they have different thoughts than their parents and that's not disrespectful. So some of those challenges, I think, are some of the biggest barriers to full participation in the curriculum. (Instructor I)

- Good leads have a strong sense of how they are perceived based on their own awareness of their authenticity with the group. They understand and have done work related to their identities.

  Know identity stuff as much as possible. (Instructor A)

  So what are we teaching about and is there theory? Is there experiential? Is there facilitation? And … are we reinforcing gender or race dynamics? (Instructor D)

- Good lead facilitators validate the experiences of students while also encouraging them to understand and possibly apply approaches that may help them be more successful. They

want to engage all voices and help students struggle through how they come to perceive those different than them.

To the extent we can be as inclusive as we can with our style and how we model getting other voices heard and all that stuff. That's important. (Instructor B)

I think that the more voices that are heard throughout that community the more often, that impacts the space that's there for learning. The more I can get them involved in any way the better. (Instructor N)

- Good leads use tactics to make students feel connected, empowered, and safe. They use past experiences, frameworks, and mindsets in order to inform their leading – their social identity is one part of that; their inclination toward certain truths or acceptance of different stories is another part.

  We want you to do X, Y and Z or to be able to do that. And helping them figure out what does that look like, how do we deliver on that? I think language and behavior has a lot to do with that too. Especially from a, teaching or a lead perspective, being sure that, whether it's inclusive language or it's progressive language or just modern or whatever the case may be, that helps, so that people feel like they're not an outsider. (Instructor N)

  They get to see that everybody feels adjusted … they can see that diversity and personalities. (Instructor F)

- Good lead facilitators know and understand who is in attendance and in the room. They believe that a more diverse set of backgrounds and experiences leads to richer dialogue.

  I would … send out applications, I talk to a lot of people and really tried to get the most diverse talented group of individuals I could to be a part of the program. (Instructor K)

  Who is on the bus matters, right? Who's on the bus matters. So when we create that space, then I think our next step is to be sure that we are paying attention to the individuals who are in that space … I think we have to pay such attention to how are we marginalizing students because of how they're acting out. It can be the exact same behavior that another student's wrestling with but because they act out in ways that are cute, we pull them in and I think that as a lead, I think that's one of our number one rules is to watch for the individuals and how are we pulling them in? How are we pulling them in? … I think the balance in all that is to trying … it's the idea that you're not spending eighty percent of your time on ten percent of the students. Right, so how do you make sure that you are then opening up that space to everyone? That's probably the number one challenge and that's why it's come back to the … full environment. How is that a

place where we're all learning? I think those are my two number one goals. My two top priorities are to create space and that I am watching for individuals not to get lost. (Instructor C)

- Good leads understand their responsibility to create a learning community where everyone involved in the institute can contribute and is recognized for what they bring to the table. They know that identity development informs their approach to being a good lead.

  Some of it is showing up in a place where I care about how others are experiencing me, are experiencing the environment, a piece of that for me also has begun to advocate. Being ready to address different injustices that may be occurring in within a group dynamic. One of the skills that I have had to develop over my years as a campus professional is how do you monitor those that may be feeling marginalized and how do you counteract that. So being aware of just by how people show up, who may be marginalized but also the dynamic of this organization, it is less respected and so they may not feel like they have as strong of a voice. For me it's a lot about monitoring the group dynamic. (Instructor E)

  Many people are afraid of talking about religion, or about politics, or about sexual orientation, or about diversity, and I don't think there's any of that that is off limits. (Instructor I)

- Good lead facilitators are able to help students navigate diversity and inclusion and those leads are able to control it; they make sure all voices are respected, heard, considered, and valued. They recognize the power of social identity and its influence on the learning environment and they recognize that students' individual stories influence their world views and they manage the diversity in the experience and help students learn to interact with diverse others and those with different perspectives.

  I want people to develop an appetite for justice and equity and equality. (Instructor A)

  This goes back to there are many ways to teach; many ways to facilitate. I like to regard myself as a social justice facilitator. In that it is both about working towards social justice but also having a particular process that is socially just. I am not into shaming. I am not into leaving people out based on identity. The process is as important as the stuff that we are working with. The learning … the way that which they learn, the way that I

facilitate is to me going to make as much difference as the actual topic itself. And I am paying attention to that and I feel that is just as important. (Instructor A)

- Good leads create an experience in which all are valued. They help students explore their own identity, they help students explore how diversity influences their lives, and they help students challenge beliefs about diverse perspectives.

  To push themselves beyond their comfort level I think is important too. That's probably more of a disposition; that they need to be willing to push and expand themselves beyond where they've felt safe. To venture a little bit outside that safety zone so that they can grow a little bit. Another thing I want to push them to learn is acceptance of others. I think we tend to see students that I think are quick to judge and quick not to listen. Those are skills that I want them to think about is our listening and acceptance of others and acceptance of others viewpoints, and being OK with hearing other viewpoints and … understanding that there can be different points of view and that's OK and that it doesn't always have to lead to conflict, war, I hate you. It can lead to we can coexist. (Instructor G)

Summary of code 6: Managing Diversity

Good lead facilitators appreciate the role that the curriculum plays in helping students understand difference. They encourage the students to have meaningful conversations about their life experiences. Good leads have a strong sense of how they are perceived based on their own awareness of their authenticity with the group. They understand and have done work related to their identities. Good lead facilitators validate the experiences of students while also encouraging them to understand and possibly apply approaches that may help them be more successful. They want to engage all voices and help students struggle through how they come to perceive those different than them. Good leads use tactics to make students feel connected, empowered, and safe. They use past experiences, frameworks, and mindsets in order to inform their leading – their social identity is one part of that; their inclination toward certain truths or acceptance of different stories is another part. Good lead facilitators know and understand who is in attendance and in the room. They believe that a more diverse set of backgrounds and

experiences leads to richer dialogue. Good leads understand their responsibility to create a learning community where everyone involved in the institute can contribute and is recognized for what they bring to the table. They know that identity development informs their approach to being a good lead. Good lead facilitators are able to help students navigate diversity and inclusion and those leads are able to control it; they make sure all voices are respected, heard, considered, and valued. They recognize the power of social identity and its influence on the learning environment and they recognize that students' individual stories influence their world views and they manage the diversity in the experience and help students learn to interact with diverse others and those with different perspectives. Good leads create an experience in which all are valued. They help students explore their own identity, they help students explore how diversity influences their lives, and they help students challenge beliefs about diverse perspectives.

Code 7: Flexibility

The Flexibility code can be found as a key focus in in institute programs by the lead facilitators themselves in this study. This led to 19 applications (occurrences) of this code, ranked 20th (tie) by number of mentions by lead facilitators and 8 leads identified its importance.

Careful review of applications (occurrences) of the Flexibility code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators understand that while curriculum takes you from A to B with a road map, good facilitation means that sometimes the route is changed but the objective of getting from A to B remains. Therefore, good facilitation means realizing there are

different ways to accomplish the same outcomes. They tailor the instruction to the individual, even in the larger group, as much as possible.

Making sure that we stick to that kind of curriculum and that purpose but be flexible for the members of the group that might be either ahead or behind that discussion I think is really important. (Instructor K)

I think that curriculum to me is a guideline it's not a mandated path. If it's a guideline, you've got to be prepared in the middle of the stream to go off the guideline and to say this is where the group is going and this seems to be where the group is wanting to head and we can head there because I've got enough knowledge about this particular area. And I always would say I've got enough tricks in the bag that I can pull something else out, and we can go a different direction. I think that becomes important in preparation. (Instructor G)

We give them a curriculum and expect them to stick to a degree, but then there are always times when they're like they were just going with this … particular topic is so we didn't get to the second part of it. And that's OK because if the students are learning and they're really getting into it, that's more important than the fact that they did the next activity … sometimes it's, I don't want to say it's irrelevant, but sometimes it's not as important as the conversation that they're already having. (Instructor J)

- Good leads know how to style-flex with their co-lead. They take a team approach and work together to find balance among their preferences and styles.

  I feel like a strength of mine is my ability to flex where my co-lead needs me to flex. I am not gregarious girl, but if I know that's what needs to show up, I can do that. (Instructor N)

  If they want me to be the nurturer or if they need me to be more energetic. I don't think it works when you have two of the same person facilitating. Usually I balance. (Instructor F)

  I'm pretty flexible. If you want me to do the introduction, I can do the introduction. If you want me to do the follow-up questions, I can do that, if you want me to do the middle activity I can do that too. (Instructor J)

- Good lead facilitators are able to take the prescription and modify as needed but they're always aware of the intended outcome. They honor the curriculum, understand end goals, and are willing to be flexible enough to go off the chartered path as long as they get where they need to go.

I don't want to call it divine intervention, but it just it comes out of you with split second … determination. You just feel, this point is going to be reinforced dramatically, or I'm going to help the connection here, if I say this, if I do this, if I refer or tell this, use this story, use this prop whatever, some of it is, I guess on the job training, but in the back of your mind you're probably drawing on a litany of things, that you just know almost from a spiritual standpoint, this is going to work. And it doesn't always, sometimes you fail, sometimes you flop, sometimes they miss the joke. Seems like though, better than half, they hit. (Instructor L)

I'm flexible and I think quickly on my feet I think. And am able to shift and redirect into something that would maybe be more powerful experience. (Instructor K)

I took theater arts as a senior in high school and learned all about improvisation. And it was incredibly valuable to learn about improve because I use it a lot … you have to be able to think quickly on your feet when someone gives you a weird answer to question. I don't want to be so scripted that I come off unprofessionally so I won't script everything. (Instructor O)

- Good leads recognize when it's time for them to teach or inform and then they can shift to a facilitative model to help students learn and get answers through discussion. They adapt their style when needed based on their co-lead. Good leads can adapt their style based on the needs of the students (and may do so while respecting that the objective is still to take students to some final point) and they prepare those around them for the bumps in the road.

  Sometimes you have to just take a hard right. You weren't planning on taking a hard right, but you need to take a hard right. Sometimes you need to say, let's go back about ten miles on the road and make sure that we either pick up the road kill, or fix the flat tire that's back there that we've just driven the car for ten miles and all of a sudden like the rim is now bent and we need to fix this problem right now. My co-lead and I train wrecked on … we didn't train wreck on vision, but they just weren't getting it and so we just finally said, let's stop. I think you're over thinking this … how do we make this easier so you aren't losing momentum and … I'm afraid some of you are losing sleep actually over it … then they're like, God, thank you for doing that … just be open about it. You've got to be able to say, OK … we need to recalibrate right here, so let's do that. (Instructor B)

  I think there's an element of, being nimble, flexible doesn't quite cover it, being really nimble so that in the moment you can teach to what the audience is ready to hear. I think that goes back to when I talked about preparation earlier and knowing where I want the students to be at any given point in the curriculum. There may be prompts or questions

that are in my facilitator guide to ask, and knowing that question that I'm going to get deer in headlights back … and being able to reword that, being able to change that, whether I figured that out in advance, or I figured that out thirty seconds ago, I think that's really important. (Instructor N)

- Good lead facilitators know the goals of the program and are OK with deviating from the map when necessary. They aim to stay true to curriculum, and yet when real learning is occurring they meander away from the script and focus on helping students get to the next stage in a different way.

  If there's opportunities throughout my session versus my lecturing … that I can include other people in that process, not just the small group facilitators but the students, if there are options in the way we're going to kind of tackle something, I like to give that to the group so that they can kind of lead the path. I'm just not kind of a dictator of I've got all of the knowledge, we would joke and call it the big jug little mug. I've got the big jug and I'm going to fill up your little mug full of knowledge, that's not really my approach per say. So I try to tackle it in a number of different ways. (Instructor K)

  I think are different ways for different people to connect to what you're trying to share and I believe in more is better. If this doesn't work for you then I'm going to have two things tomorrow that are going to work for you. I try and vary my approach significantly to try and meet our educational goals. (Instructor K)

- Good leads can manage unexpected things that pop up over the course of the institute. They keep their cool when unplanned events occur.

  With the chaos of human beings, you've got unexpected curve balls. (Instructor L)

  Curveballs are going to happen, and so I often think … you can manage the logistics in the moment when you need to, but if you can get all the things out of the way that you can predict, then mentally I'm going to be in a better state. Those are the types of things I think that were easy for me … I can check these off. I know these are going to happen. Then if I can get those done, I can focus mentally on the other important stuff and manage curveballs that will come up. (Instructor M)

Summary of code 7: Flexibility

Good lead facilitators understand that while curriculum takes you from A to B with a road map, good facilitation means that sometimes the route is changed but the objective of getting from A to B remains. Therefore, good facilitation means realizing there are different

ways to accomplish the same outcomes. They tailor the instruction to the individual, even in the larger group, as much as possible. Good leads know how to style-flex with their co-lead. They take a team approach and work together to find balance among their preferences and styles. Good lead facilitators are able to take the prescription and modify as needed but they're always aware of the intended outcome. They honor the curriculum, understand end goals, and are willing to be flexible enough to go off the chartered path as long as they get where they need to go. Good leads recognize when it's time for them to teach or inform and then they can shift to a facilitative model to help students learn and get answers through discussion. They adapt their style when needed based on their co-lead. Good leads can adapt their style based on the needs of the students (and may do so while respecting that the objective is still to take students to some final point) and they prepare those around them for the bumps in the road. Good lead facilitators know the goals of the program and are OK with deviating from the map when necessary. They aim to stay true to curriculum, and yet when real learning is occurring they meander away from the script and focus on helping students get to the next stage in a different way. Good leads can manage unexpected things that pop up over the course of the institute. They keep their cool when unplanned events occur.

Code 8: Good Course Design

The Good Course Design code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it was also highlighted in institute programs by the lead facilitators themselves. This led to 16 applications (occurrences) of this code, ranked 23rd (tie) by number of mentions by lead facilitators and 11 leads identified its importance.

Careful review of applications (occurrences) of the Good Course Design code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators pay attention to the curriculum. They attend to the priorities and learning objectives. They acknowledge the role that good curriculum has in making them good. Good lead facilitators give credit to those who create curriculum for the institute and they recognize it's not about doing anything more than using their skills to implement the curriculum. They take the time to revisit the goals of the program and help students understand how they have done.

  We … hopefully have written and delivered the curriculum in a way that intentionally pushes some developmental buttons, and sort of pushes them along to think differently, and to look at the world differently, at least from a psychosocial perspective. And that's great, but that means when they leave they look at everything else differently too. If we've done our job and they're thinking about X more complexly than when they leave, they're thinking about A through Z more complexly too, and I think that can be really confusing, so I think that probably, I don't know if it inhibits understanding, but it definitely challenges it. (Instructor N)

  The design is already there … yeah … I literally think that's what it is. It helps that the curriculum is good. If it was a crappy curriculum … yeah it wouldn't be no fun (Laughter). I would be wanting to change it … I think the design is good and the curriculum is good, and so I can really have more fun with it … where when I have to hold it all, I don't know that I have the same amount of fun. (Instructor A)

  The curriculum of UIFI lately has created some good personal learning, personal self-awareness for participants via activities. So even if they're not invested, if they've played the games, if they've done the activities, if they've shared, then there's an element of self-awareness that cannot be avoided and I think that that's beneficial to the individual for their leadership development but also their personal growth. (Instructor H)

- Good leads recognize the value in creating and setting clear expectations. They know they must set a strong foundation for good learning to occur.

  I think it's setting clear expectations for the faculty and setting expectations for the students about … how we're going to be in community together for this six-day period is really important, because if we don't set that from the onset and don't have that

established, we can take the will of the land and go someplace that we don't need to go for whatever reason and get derailed pretty quickly. (Instructor B)

I think probably everything that comes to mind immediately can fall under that umbrella … of community standards, boundaries, what's our learning environment going to be, who are the people here and what are their roles in that learning environment, orientationy stuff, what are the goals of this institute, why are you here, what do we expect you to walk away with, learning outcomes for lack of a better phrase, things, introductions, group expectations … I feel like that all can fall under expectations. (Instructor N)

Not only telling students that we are here to learn, but being willing to go there quickly … there is some intellectual stuff that's involved as well, so it's willing to be teaching them new concepts of leadership and new things. We don't want to overload the front end of the experience with that, but if you spend too much time on the front end only, doing kind of the low risk things that are also fun, and outdoors, that's not a good picture of reality either for how the experience is designed for someone to learn, right? Got to challenge them mentally, too, not just socially and physically, and so I think being prepared to have those types of sessions early so there's a good balance. (Instructor M)

Summary of code 8: Good Course Design

Good lead facilitators pay attention to the curriculum. They attend to the priorities and learning objectives. They acknowledge the role that good curriculum has in making them good. Good lead facilitators give credit to those who create curriculum for the institute and they recognize it's not about doing anything more than using their skills to implement the curriculum. They take the time to revisit the goals of the program and help students understand how they have done. Good leads recognize the value in creating and setting clear expectations. They know they must set a strong foundation for good learning to occur.

Summary of codes 1 – 8: What good teachers know and understand

Eight of the 27 codes fall under this question of what good teachers know and understand, and include: Expert Presentation/Delivery, Role-Modeling, Authenticity, Integrity/Ethics, Experiential Learning, Managing Diversity, Flexibility, Good Course Design. Of these eight codes, the lead facilitators in this study identified four codes, two codes were

identified by students in my early research project about student perceptions of good lead facilitations in institutes, and one code was identified by the meta empirical research about effective teaching in the classroom. In sum, this resulted in 332 applications (occurrences) of code of the 1,328 total, or 25% of all applications (occurrences) under the research question of what good teachers know and understand.

Research Question #2: How do good teachers prepare to teach? (Codes 9 – 10)

Two of the 27 codes fall under the research question of how good teachers prepare to teach, and include: Master of Content/Knowledge and Well-Organized. The codes are ordered and prioritized (highest to lowest) based on their frequency of application (occurrence) from the 15 transcribed interviews with good lead facilitators from the four programs in this study.

Code 9: Master of Content/Knowledge

The Master of Content/Knowledge code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it was also highlighted in institute programs by the lead facilitators themselves. This led to 61 applications (occurrences) of this code, ranked 7th (tie) by number of mentions by lead facilitators and all 15 leads identified its importance.

Know your stuff. (Instructor H)

I've done my homework. (Instructor O)

It is critical to be confident and competent with the material. (Instructor D)

I am willing to prepare; to come ready to do the work. (Instructor E)

Careful review of applications (occurrences) of the Master of Content/Knowledge code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators know there is no substitute for doing their homework. They view preparation as paramount to their success.

  You've got to be prepared to do it all. You need to be prepared for all of it. (Instructor B)

  Well if I'm being truthful with you I get really jazzed about preparing, because at the same time I'm preparing I'm also learning. And I love to learn. That whole learning piece becomes so important to me when I'm preparing because I'm growing and developing and there's my reward. (Instructor G)

  Most of the time when I'm preparing, I'm asking myself, 'what do I know about this?' Right? 'How can I use myself real-time to make this, that I'm sharing, or as I would share this, come alive?' So do I have a story? Do I have an example? Whether it's of my own personal lived experience or what I learned or heard from someone or something I saw on television or in a movie or something. How do I make it come alive? And so for me, stories are very powerful. Real stuff that's connecting … How can I make this relate to this population, to these students? (Instructor D)

  The common denominator by far is study. Studying and reading and learning. You're handed a curriculum and you're handed materials that typically someone else has written and have entrusted to you to present and to bring to life, and I think it's critical that you know that in and out, backwards and forwards and sideways. (Instructor N)

- Good leads recognize how components of curriculum flow together and help students connect the dots.

  Someone who can, at the ready, recall content, or examples, and have enough confidence in their own, not that they have to have the answer for everything, but that they are experienced enough in knowing how to facilitate an issue, however it may be posed, in satisfactory or exemplary terms. (Instructor L)

  If you're put in a situation when you're facilitating that curriculum you've got the opportunity to pull upon the knowledge that isn't written there in the manual, the facilitation guide. You've got to be able to dig deeper than the facilitation guide, right? If you're going into facilitating a week-long experience and you haven't done your homework … not only could you, I don't even worry about the embarrassment part to me, but you're really doing a disservice to the participant, I think. You need to make sure that you're fully prepared to go any direction. (Instructor G)

  I know one of the things I do that makes me a good instructor is that I know what I'm talking about … I know the content and when I say I know it, it doesn't mean I know all of it. Like, I don't know everything there is to know about leadership and integrity, everything there is to know about inclusion or everything there is to know about chaos, or

everything there is to know about making mistakes, but I do know a good bit about it. I do know a good bit about leading and some of that knowing is not just from teaching about it. It's about living it. (Instructor D)

- Good lead facilitators realize that if they have mastery of the curriculum, it allows them to be more open to conversations with students.

  My goal is to know the content so well that I can just react in the moment. (Instructor C)

  When there is a clear authenticity and understanding of the concept, and it seems to come out of you. It just seems to be a part of you. It is part of your essence; it is innate, it's not forced, it's not contrived; it is you. And you're just kind of helping share that with others. (Instructor L)

  I think because I know it so well, it's easy to get into the flow pretty quickly. (Instructor B)

  I have a high level of comfort with the content and so then I can just spend time on how am I fully present. (Instructor C)

- Good leads don't just work toward mastering the content but prepare for the content facilitated in an institute and are able to adapt to the environment as needed. They use proven teaching models such as experiential learning and they use frameworks and theories to facilitate the curriculum.

  All of that student development theory that all of us have set through in our master's and PhD and EdD programs, I think that there's some real value to that. I think that people knowing and students knowing that they're people that studied this and studied behavior and studied challenge, Sanford's challenge and support or King and Kitchener' s reflective judgment, or Chickering's vectors, whatever it is, I think that that's a component that people think oh theory. I think theory's great. I don't think one theory is great I think the collection of theory is great. (Instructor K)

  I make sure that I try to get my hands on every resource that I can prior to getting there and then have a few more up my sleeve. (Instructor G)

  I am well-read, so therefore have the ability to have conversations about many things, not just the curriculum. (Instructor H)

- Good lead facilitators keep in mind the objectives and long-term implications of the curriculum and understand that there is a greater good. They know the organizational and program objectives in order to prioritize.

  It's more than just reading and knowing what's supposed to be delivered, it's also transferring that into, how do I make this my own, and make sure that I'm not just reading from bullet points in the pre-prepared curriculum. But that I'm delivering them with the intended outcomes. They have to be part of me and I have to read them and prepare for them in that way. (Instructor L)

  I would always start with the curriculum and familiarize myself with the learning outcomes of the program. What the activities were, what we need to get out of those, what the, what the 'ah ha' moments need to be in each of those specific curriculum elements. (Instructor I)

  You needed to know your stuff. And before I used to be intimidated by that but by the time I was lead facilitator I really wasn't; because I was so confident in my responses. I was so confident in being able to explain these things. (Instructor O)

- Good leads are clear about the purpose of the program, understand and know the curriculum, ultimately know that the end point matters most and believe that surrounding yourself with good teammates will get you there. They understand the intentions of the experience and how the curriculum is developed to accomplish said intentions.

  How are you grounded in your content, and then how do you evaluate that as you go, and then celebrate it when you're done. (Instructor C)

  If you're prepared with a curriculum I think that I can easily … clearly explain the principles that we're trying to learn or the activity that we're trying to do. (Instructor I)

  Do I know how the activity that we're going to facilitate is going to work? Do I know what the talking points are, in the sense of it not being memorized but in the sense of I am not then tied to a script of what we're doing because I know that we need to hit on these four content points before we finish. And to be able to do that in a fluid and comfortable way where I don't have to be holding the book in my hand to make it effective. (Instructor E)

- Good lead facilitators take theoretical concepts and help students apply them in a way that makes sense. They help students recognize how they can use what they've learned to do something.

  Be intentional about examples that I use that will hit more in a group. (Instructor H)

  A lot, at least of things that I've used, or come up with, again within those boundaries that may or may not necessarily be dictated by the curriculum, because a lot of that is written for you; but if there are other things that can enhance that within acceptable limits, a lot of that has been then result of reading, right? And so whether it's been a litany of other books, or current events, really accepting and looking throughout life, your own life, there are so many daily stories that can be told, that reinforce a moment in a classroom. (Instructor L)

Summary of code 9: Master of Content/Knowledge

Good lead facilitators know there is no substitute for doing their homework. They view preparation as paramount to their success. Good leads recognize how components of curriculum flow together and help students connect the dots. Good lead facilitators realize that if they have mastery of the curriculum, it allows them to be more open to conversations with students. Good leads don't just work toward mastering the content but prepare for the content facilitated in an institute and are able to adapt to the environment as needed. They use proven teaching models such as experiential learning and they use frameworks and theories to facilitate the curriculum. Good lead facilitators keep in mind the objectives and long-term implications of the curriculum and understand that there is a greater good. They know the organizational and program objectives in order to prioritize. Good leads are clear about the purpose of the program, understand and know the curriculum, ultimately know that the end point matters most and believe that surrounding yourself with good teammates will get you there. They understand the intentions of the experience and how the curriculum is developed to accomplish said intentions.

Good lead facilitators take theoretical concepts and help students apply them in a way that makes sense. They help students recognize how they can use what they've learned to do something.

Code 10: Well-Organized

The Well-Organized code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it was also highlighted in institute programs by the lead facilitators themselves. This led to 16 applications (occurrences) of this code, ranked 23rd (tie) by number of mentions by lead facilitators and 11 leads identified its importance.

Careful review of applications (occurrences) of the Well-Organized code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators know their profession and know higher education and can pull in ideas from other sources. They have an understanding of where these students go to school and their experiences. Good lead facilitators do more than show up and do a good job facilitating; they have been students of their environment. They use what they've learned as a result of experiences they have outside of the institute environment and can scaffold students' learning in a way that makes sense.

  You're off to a great start if there is a good initial framing and understanding as to the context as to how and why we are here. When that happens, it's not just random. (Instructor L)

  They're also hearing one message in that moment in those five days, they're not hearing the seventeen other messages that can confuse them. (Instructor N)

  I try to present the information in a clear and concise logical manner that students can make sense of it and take the material, and use it somehow, however that might be. (Instructor G)

I like to kick off with what have we done previously so we started with X and then yesterday we talked about Y and now I'm going to make sure that we finish up my talking about Z and why is this important? Then we usually discuss the Y piece … because that helps it makes the connection that this is a synchronous or this is a linked curriculum so not just a hodgepodge of activities and discussion points, this is linked throughout. It's a scholastic scoping sequence or whatever it is, we'll call it curriculum. That's usually I start off with a big why we're here what we're doing here. (Instructor O)

- Good leads know that part of being successful is managing details. They know that by handling the small things, it allows them and the students to be present in the conversation about larger subjects. Good leads know that logistics matter.

  Tactically, you have to think about prep … you have to let logistics dictate some of your prep. (Instructor B)

  My initial reaction is oftentimes to gravitate towards logistics. So what helps me is, if I can make sure that all those things are as prepared as possible and as early as possible, even weeks, months, in advance. (Instructor M)

  Even though I don't think as a lead facilitator your primary job is sort of logistical in event management, that is a skill set I have, so I think when you take care of that crud and those details, that it creates a better space for learning, so the fact that, for me, all of that is very second nature and the idea of thinking four steps ahead or six hours ahead of where we are and making sure everything is set up so that the teaching is the center of the attention, I think that helps make me a better lead facilitator, because the details are done and they're taken care of. (Instructor N)

Summary of code 10: Well-Organized

Good lead facilitators know their profession and know higher education and can pull in ideas from other sources. They have an understanding of where these students go to school and their experiences. Good lead facilitators do more than show up and do a good job facilitating; they have been students of their environment. They use what they've learned as a result of experiences they have outside of the institute environment and can scaffold students' learning in a way that makes sense. Good leads know that part of being successful is managing details. They know that by handling the small things, it allows them and the students to be present in the conversation about larger subjects. Good leads know that logistics matter.

Summary of codes 9 – 10: How good teachers prepare to teach

Two of the 27 codes fall under this question of how good teachers prepare to teach, and include: Master of Content/Knowledge and Well-Organized. Of these two codes, both were identified by the meta empirical research about effective teaching in the classroom. In sum, this resulted in 77 applications (occurrences) of code of the 1,328 total, or almost 6% of all applications (occurrences) under the research question of how good teachers prepare to teach.

Research Question #3: What do good teachers expect of their students? (Codes 11 – 14)

Four of the 27 codes fall under the research question of what good teachers expect of their students, and include: Critical Thinking, Questioning, Trust, and High Expectations. The codes are ordered and prioritized (highest to lowest) based on their frequency of application (occurrence) from the 15 transcribed interviews with good lead facilitators from the four programs in this study.

Code 11: Critical Thinking

The Critical Thinking code can be found as a key focus in in institute programs by the lead facilitators themselves in this study. This led to 61 applications (occurrences) of this code, ranked 7th (tie) by number of mentions by lead facilitators and all 15 leads identified its importance.

> *One of the number one problems in teaching is people ask questions that are too easy. (Instructor C)*
>
> *I want them to be more complex about the subject when they leave than when they show up. (Instructor N)*
>
> *I want them to question everything around them. (Instructor A)*
>
> *It's important for them to be challenged because I have high expectations. (Instructor F)*

Careful review of applications (occurrences) of the Critical Thinking code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators invite students to dwell in questions. They help students' progress along a learning continuum from remembering to understanding what they are applying. Good lead facilitators help make meaning with and for participants.

  I want students to question the status quo and to question the, really the norms that they are probably used to seeing and hearing. (Instructor M)

  I'd like them to question themselves, I'd like them to question each other, I'd like them to question the people who aren't there. The ooh that makes me really nervous part of me says I'd like them to question the material, and where did we get this stuff and why do we think it's such a big deal and why are we spending all this time and energy on it? That's scary, but I mean, if they're really thinking critically about it and if they're really there and they're really present, they probably should be doing a little bit of that too. (Instructor N)

  I want them to question and validate their value set or their belief. Sometimes I want them to question their authority or their lack of authority. I want them to question power. I want them to own possibility versus be paralyzed by fear. (Instructor H)

  I want them to question wherever they are absolute. Right? So if, 'well, this is what is the truth. This is absolute.' I want them to question that. I want students to … so for me that is questioning the things that they've never questioned. I want them to question the spaces in them that they are afraid to go to, or that they run away from, or the moments that they get shut down, or the things that trigger them. I want them to question those things so that they can really learn and see what those things are about and how those things will impact their leadership and power in the world. (Instructor D)

- Good leads challenge students to go to places they had not gone previously and provide support as they explore these issues. They push students to examine their worldviews and consider if they make sense given their new knowledge.

  Even in the context of challenging thinking and challenging things that are being shared. Be able to ask it in the form of a question, I think some of our most powerful conversation is around a student who shares something and then saying to the larger group 'what do you people think about that?' (Instructor E)

Certainly there are ways to define progress … if they haven't put any thought into it I challenge them about that. (Instructor F)

I believe there is a level of learning that happens when we get to question/challenge/push up against what we think we know. As much as possible, I have a goal of challenging students and asking questions; challenging them to see things in a different way. (Instructor A)

I think it's important for a facilitator to ask very challenging yet open-ended questions … I found I've had to be more careful with my questioning, because you quickly find the students will tell you what they want to hear, because they feel like they want to show you that they know the answer or that they just want to get in your good graces early on. You never know but, to me, asking tough questions and very thoughtful questions with a purpose. (Instructor M)

- Good lead facilitators help students to critically think. They promote more complex thinking about realities, challenge dispositions, and force students to question their experience.

  I want them to be able to reflect on what's been said. I want them to be able to critically think about what I have said. I want them to be able to apply what they're getting from me to something real. (Instructor D)

  I really like it when students will learn to think for themselves, and not accept urban legend … I love an independent mind. Are they developing something on their own, or are they really just repeating what their parents said? Or what the person said … versus critically thinking. I'm a verbal learner so I'm exploring my thoughts here even, I think that's probably what I think, more the independence of thought, the critical thinking; that's the disposition I'd want them to have. Being able to even relinquish some of their own, prior, deeply held convictions; again because of where they grew up, how they grew up, what they've been exposed to, what their own personal biases or filters are, and allowing themselves to potentially hold, at that same time, objectively an opposite view, and then kind of ferreting between those, to really determine their own belief; independence and critical thinking. (Instructor L)

  Usually the people that challenge … things, the people that are questioning their curriculum, are having some sort intellectual dilemma and I want to help them get from A to B or A to D … they're getting half way there but they just can't get over this hump because something's not making sense and so I respect that because it shows me that they're thinking about it critically and I want them to be critical thinkers. I don't want them to feel like we're force-feeding them this doctrine, that they have now abide by. I want them to be critical thinkers so if they don't think that something in the curriculum is relevant or that is doesn't have a place, then when they speak up I usually am pretty

receptive to that. I want them to question the curriculum and obviously I want them to question the practices of their organizations back on campus. (Instructor O)

- Good leads make it about the students. They recognize the layers of consciousness for students. Good leads know that students can apply the lessons in many spheres of influence, and they work to make it personal for the students. They help students make sense of the knowledge in their individual, organizational and greater societal context.

  Is the awareness that I have of myself true, accurate, and tested? Am I engaged in something that I care about? Why or why not? If so, what? If not, what? How is my involvement connected to or relevant to anyone else? Am I a doer or a thinker and how is that a pro or a con? Am I an agitator or a fixer and how is that a pro or a con? Am I a part of the problem? If so, can I become part of the solution? Do I want to be part of the solution … 'if I am part of the problem, what choice am I going to make here' is the big question that I ask. (Instructor H)

  Whatcha doing here? Why … do you think you're on the planet? Why do you believe you're here? How do you believe and/or want to be? So even if you don't have this belief system around purpose or destiny or predisposition … or any of that. How do you want to be a contribution to the planet? So some folks say, 'I don't believe I've been put here to be anything. It's what I want to be is all.' Whatever works for you. If you believe you've been purposed, if you show up in what you want, whatever it is. How do you believe you've been purposed or how do you want to be a contribution to the planet? How do you want to leave the planet? How do you want to be remembered? Those are the big questions. Sometimes what comes under that is what's the leadership you want to take? What are the things you want to change? But all of that comes under those others, and I think the other big question is what keeps you from showing up in your full power? What are you afraid of and what kind of support do you need to move through that fear so that you can be who the world needs you to be? (Instructor D)

  Who am I? And what am I doing here? I know they're sort of bigger universal often time spiritual questions, but I think that the answers to those … questions, for me, were so pivotal and instrumental in who I am today. Those are the questions I want them leaving at least starting to understand how they can figure out those answers, if they don't figure out those answers there … I think those are at the root of it all I think those are sort of what I get out of my interactions with students. What I hope that they start thinking about more tangibly. (Instructor I)

- Good lead facilitators get their students thinking. They focus on helping participants take in the information, conceptualize it in their context and make the information their own in a way that will make sense as they implement the lessons learned.

As a result of being with me ... I do want them to be able to think. And think is such a huge concept … I think about intellectually, I want them to know that they can think. (Instructor A)

It's actually a question that engages them intellectually and gets them thinking and will get their brain turning. (Instructor M)

I want them to think about every situation, or every interaction they have and figure out; 'what's missing from the equation … why'? I think that there are always questions to be asked. (Instructor I)

- Good leads often have clear visions of what students do when they are applying what they are learning. This helps to guide their approach and lets them know when they've had some success.

  I love seeing them come in and the assumptions they made about each other and we talk about assumptions. (Instructor K)

  I expect them to be able to put into practice what it is that we either did in a simulation, or what it is that we talked through, whether it was a new leadership model … I expect them to make decisions based on the fundamental principles and values that played out at the session. (Instructor M)

  I like students who are willing to say the unsaid and ask the tough questions. Yeah. Willing to show up seeing it differently than me or in disagreement with something that I've put out. (Instructor D)

- Good lead facilitators invite students into deeper thinking about what's being said, taught, and experienced. They want to help students peel the layers of the onion back to reveal what's beneath the surface.

  Show a deep skill set around critical thinking … I just have such a high regard for that … some sort of intellectual critical thought rather than be the participant who is just kind of regurgitating what they know we want them to say. (Instructor O)

  I would like them to be able to think deeper, to consider things from multiple perspectives, from both an intellectual and emotional state, to be able to see themselves as a piece of the larger world. (Instructor E)

  My personal objectives or hoped-for outcomes are that folks feel like they leave the experience better than they came, so that the experience was a value-add to their life.

That there's a deepening around something, and it doesn't have to mean or look the same for all of them, but they feel like they're leaving with some questions. (Instructor D)

- Good leads are great facilitators. They utilize a combination of silence and compelling questions to help students take the concept to the next level.

  I don't answer everything. I don't say, 'yep, that's right' or 'yep, that's wrong.' (Instructor D)

  One of my favorite things that I've learned years ago from exceptional leads is 'wow, OK so I'm not so sure your wrong but I'm not so sure you right either.' (Instructor E)

- Good lead facilitators have positive outcomes they wish to see in students. They know that it helps students to experience small wins along the journey and keeps them motivated to move forward.

  I think in the back of my mind I've always thought the if we can help them walk out of the program at the end of the week thinking critically about the decisions that they make on a daily basis and referencing back to the curriculum or referencing back to an activity, something that they've done during that week, as positively influencing them, we will have succeeded. (Instructor G)

  They've got to figure out on their own. I think that really sets the stage early of the type of experience we want them to have. I think it so translates later on down as you're talking about more heady topics to be able to reflect back on those things and say 'remember when we were doing this?' 'Remember when we didn't think we were going to be able to accomplish this' and so and so said this and that changed the way we saw it and gave us the opportunity to have a win. I think that's how I try and set it up. (Instructor K)

Summary of code 11: Critical Thinking

Good lead facilitators invite students to dwell in questions. They help students' progress along a learning continuum from remembering to understanding what they are applying. Good lead facilitators help make meaning with and for participants. Good leads challenge students to go to places they had not gone previously and provide support as they explore these issues. They push students to examine their worldviews and consider if they make sense given their new knowledge. Good lead facilitators help students to critically think. They promote more complex

thinking about realities, challenge dispositions, and force students to question their experience. Good leads make it about the students. They recognize the layers of consciousness for students. Good leads know that students can apply the lessons in many spheres of influence, and they work to make it personal for the students. They help students make sense of the knowledge in their individual, organizational and greater societal context. Good lead facilitators get their students thinking. They focus on helping participants take in the information, conceptualize it in their context and make the information their own in a way that will make sense as they implement the lessons learned. Good leads often have clear visions of what students do when they are applying what they are learning. This helps to guide their approach and lets them know when they've had some success. Good lead facilitators invite students into deeper thinking about what's being said, taught, and experienced. They want to help students peel the layers of the onion back to reveal what's beneath the surface. Good leads are great facilitators. They utilize a combination of silence and compelling questions to help students take the concept to the next level. Good lead facilitators have positive outcomes they wish to see in students. They know that it helps students to experience small wins along the journey and keeps them motivated to move forward.

Code 12: Questioning

The Questioning code can be found as a key focus in in institute programs by the lead facilitators themselves in this study. This led to 27 applications (occurrences) of this code, ranked 17th by number of mentions by lead facilitators and 14 leads identified its importance.

I ask questions. (Instructor A)

I think there's an art to asking good questions. (Instructor M)

I use a lot of probing questions I've notice when I teach. I'll ask a lot of questions. (Instructor G)

Careful review of applications (occurrences) of the Questioning code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators have a talent for asking open-ended questions. Allowing students to marinate in questions helps them come to their own answer and find their own truth.

  It's open questions … letting the silence sit there, right? Just sitting in silence. Like not feeling like you have to create the answer or the space and when you're asking questions that they're open questions. (Instructor C)

  Leave them with some open ended questions and leave them with some 'we want you to think about this over the next hour or so' because then when you get into the small groups you're going to get into it a little bit deeper. (Instructor J)

  I'm good at letting them continue the dialogue and letting them have the learning experiences and just maybe providing a prompt or asking a question in a different way if they get stuck. (Instructor I)

- Good leads ask students to question everything. They help students figure out how to apply the lessons taught, how to answer the questions of what's next, and how to use the take-aways from the material.

  The only people we can truly change are ourselves and I want them to question everything possible so that when they realize the answers, it came from them and not anyone else. I don't ever want to have people take what I say as truth. I want them question it. I want them to find the value of understanding, because I think, you truly don't take something at face value unless you've learned it for yourself. (Instructor F)

  Everything's questionable. I mean there are very few hard truths in this world that can't be questioned and explored. (Instructor K)

  I want them to question everything, to be honest. That's one of the risks of that everyone has is getting to the place where the status quo is the norm because it's the norm, and I think that things only change or improve or get better once questions get asked. I think that's why the processing activity starts with questions. Often times that leads to more questions. (Instructor I)

- Good lead facilitators push boundaries. They invite students to question authority. Good lead facilitators challenge students in new ways and they force them to question truths. They are OK with dissonance, challenging, and questioning and they are not afraid to throw the bomb out there and see what happens.

  I grew up in high school with a question authority bumper sticker on my car … I want them to question everything. I want them to ask questions about everything and I want them to never stop asking questions. Because, for me, that leads to complacency and it leads to … we will just accept things the way they are and just go forward. (Instructor G)

  A common mantra in our society, really what the country was built on, is question authority which is a great thing; part of our checks and balances in our culture. (Instructor L)

  I love the idea of questioning stuff and I always tell students question … even question me, question authority, but thoughtfully. You can always question authority but question it thoughtfully as you're doing it and I think that that served me well. (Instructor K)

- Good leads capture students' excitement and present big questions for students to grapple with. They understand that the scope of the institute may not allow for resolution. Good leads provide new information and lessons that inform new perspectives but constantly invite students to question.

  I would much rather ask the students a lot of questions, present snippets of information, dig deeper through that with them than tell them what we want them to know or tell them what the concept is. (Instructor N)

  You have to ask questions that aren't going to occur to them. I think you have to get to know the student. I know you do. (Instructor F)

  Questions are, I would say … are always in my hand. I lead with questions. That is how I do my learning and I have heard that is how people have learned from me … by asking the right question or asking a question … consider or reconsider and be inquisitive and curious. I wrap that around that goal of challenging and questioning and being in the question. (Instructor A)

- Good lead facilitators provide space for the students to ask and dwell in their own questions. They can manage expectations, challenge them, and reform them. Good lead

facilitators recognize that others must learn through this process – they also recognize it's not about them.

I try and have them come up with questions. (Instructor K)

If we can get them to question even not only their own experience but question each other in a very healthy way, that's where I think some pretty powerful learning can happen. (Instructor M)

I want students to question wherever they are agitated, number one. If there are clear places of agitation, I want them to get digging in that. (Instructor D)

Summary of code 12: Questioning

Good lead facilitators have a talent for asking open-ended questions. Allowing students to marinate in questions helps them come to their own answer and find their own truth. Good leads ask students to question everything. They help students figure out how to apply the lessons taught, how to answer the questions of what's next, and how to use the take-aways from the material. Good lead facilitators push boundaries. They invite students to question authority. Good lead facilitators challenge students in new ways and they force them to question truths. They are OK with dissonance, challenging, and questioning and they are not afraid to throw the bomb out there and see what happens. Good leads capture students' excitement and present big questions for students to grapple with. They understand that the scope of the institute may not allow for resolution. Good leads provide new information and lessons that inform new perspectives but constantly invite students to question. Good lead facilitators provide space for the students to ask and dwell in their own questions. They can manage expectations, challenge them, and reform them. Good lead facilitators recognize that others must learn through this process – they also recognize it's not about them.

Code 13: Trust

The Trust code can be found as a key focus in in institute programs by the lead facilitators themselves in this study. This led to 19 applications (occurrences) of this code, ranked 20th (tie) by number of mentions by lead facilitators and 11 leads identified its importance.

> *There's got to be a tremendous amount of trust that is started from the very beginning. (Instructor L)*
>
> *I trust students. I believe in students. (Instructor K)*
>
> *In an institute you are creating a circle of trust. (Instructor F)*
>
> *The number one thing is actually trust. (Instructor O)*

Careful review of applications (occurrences) of the Trust code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators approach their facilitation work like a supportive family. They recognize their role as conveyer of information and, more importantly, as support along the way while students make sense of the lessons and apply them to their individual context. Good lead facilitators don't dictate how students come to think. They provide perspectives and ideas and then trust that students will make their own meaning.

  > *Building trust and confidence in your relationships … those are valuable life skills. (Instructor M)*
  >
  > *They've got to have a trust and understanding that this is a safe space and that I can share a little bit more than maybe I initially wanted to share because this is a place where I'm part of a family. (Instructor K)*
  >
  > *Using myself as an example. I think that that goes a lot further to break down barriers and to build relationships that are trusting relationships than just trying to understand them or trying to facilitate them through that conversation. (Instructor I)*

- Good leads place trust in others and provide leadership that allows others to trust them. They believe in the students' potential. Good leads work with students to help them "be better" and have a commitment to help students see this ability in themselves.

  We trust your judgment; we're not going to be here to babysit you, but we also have expectations. (Instructor M)

  They've made a difference to me as I hope that I have to them; they hear that I trust and that I'm sending them off with goodwill and good intentions; they hear a realistic expectation and understanding of what this experience has been. (Instructor D)

  Connecting with people before. I think what is happening if I were to break it down in my head is building a level of trust. Of, I am trustworthy as a facilitator. (Instructor A)

- Good lead facilitators ask students to trust the process. They recognize this is not a blind trust, but rather established through creditability and validated through actions.

  We always talk about trust the process. (Instructor J)

  I don't know that I make promises, I think that my biggest thing that I encourage them to do is to trust the process. (Instructor I)

  Everything is in there with a purpose. Just trust that people have looked that through and have gone over it with a fine toothcomb. (Instructor J)

- Good leads believe students can be more and are able to do great things as a result of their involvement in the institute.

  I would describe it as being more of mentoring relationship and being more of a relationship of trust, and so, my relationship with students during the institute has been more of … let me back up – mentoring, trust, and a resource. (Instructor G)

  So what does this mean for you as an individual? How do you want how do you see the world differently now? How does this make you think about real world scenarios? Those are some of those questions; I guess what I'm saying is not letting them know that that's what you're asking them until you've have gotten them to a place where it can be asked. Breaking down some of those barriers, building relationship with them, and getting them to trust you and trust the process before you can really ask and get those answers. (Instructor I)

Summary of code 13: Trust

Good lead facilitators approach their facilitation work like a supportive family. They recognize their role as conveyer of information and, more importantly, as support along the way while students make sense of the lessons and apply them to their individual context. Good lead facilitators don't dictate how students come to think. They provide perspectives and ideas and then trust that students will make their own meaning. Good leads place trust in others and provide leadership that allows others to trust them. They believe in the students' potential. Good leads work with students to help them "be better" and have a commitment to help students see this ability in themselves. Good lead facilitators ask students to trust the process. They recognize this is not a blind trust, but rather established through creditability and validated through actions. Good leads believe students can be more and are able to do great things as a result of their involvement in the institute.

Code 14: High Expectations

The High Expectations code can be found as a key focus in in institute programs by the lead facilitators themselves in this study. This led to 16 applications (occurrences) of this code, ranked 23rd (tie) by number of mentions by lead facilitators and 8 leads identified its importance.

Expect to learn something. (Instructor N)

Challenge. High expectations. (Instructor C)

I expect students to be engaged. (Instructor K)

I'm a little anal-retentive and tend to get partners that are very great at expecting the best. And I have high expectations too. (Instructor F)

Careful review of applications (occurrences) of the High Expectations code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators aspire to transformation or some level of change for students – there's a presumption that the institute experience will change them or that they need changing, redirection, or empowerment. They expect change and possibly transformation.

  We just are not going to stand for that anymore, so it becomes very serious, no longer a joke, and we're serious and I have no problem challenging. (Instructor O)

  I hope that sometimes my teaching or facilitation style does not give them answers. I hope that it challenges them. I sincerely expect that it will allow them to challenge themselves consistently and maybe help them be a better facilitator and teacher in return. (Instructor F)

  I think that promise of we're going to challenge you, and we're expecting you to challenge us. (Instructor M)

- Good leads want to help with a powerful learning experience. They're committed to students but they want the experience to change the students. They believe that these students are going to fix the fragmented worlds in which they live; good leads recognize this and help students get the skills and explore the issues enough so that they can go about fixing things. They play a role in identifying students' potential and are focused on moving students to the next step or level.

  You might not hold a position, you might not be in on all the important meetings just yet; but you are a leader now, whether you like it or not. What I mean by that point and when I use that point I use it in a context of that much is expected – that kind of common theme that we see a lot of. That if anyone is going to change the chapter, if anybody is going to change the organization it's going to be them – it's going to be them in that room. (Instructor O)

  They, as leaders, need to give back. That's an important component to me in community service and it's not just writing a check, it's not just about going to something and spending an hour on a soup kitchen or something. It's more than that. It's about giving back to our communities through service through our contributions through engaging people that have not maybe ever been engaged before on our campuses and universities. (Instructor K)

I drew a line in the sand of from here on out it's going to be more serious. I'm not saying we're not going to have fun – we're going do some icebreakers and we're going to play Mafia and we're going to have some fun still, but we're not going to let you off the hook either. So at some point you have to decide when exactly is that moment going to be. The curriculum should be written that way but the lead facilitators need to be aware of when are they going to make that transition in how they ask questions. How they respond to questions. How they challenge a student. (Instructor O)

- Good lead facilitators reconcile their own high expectations as well – there are program expectations, student expectations, and facilitator expectations they must manage and they are smart enough, present enough to recognize when some part of any of these is not going well. Good lead facilitators recognize their leaving their mark – they're in it to help students and to help colleagues in helping students but they want to influence and persuade institute students to be better, know something, and change.

  I tend to be a little bit specific or have a high standard for how I want session to go, or how I want, the session to be. (Instructor O)

  What I have found recently for this population, sometimes its explicitly saying this is what we expect this space to be. We want you to do X, Y and Z or to be able to do that. Helping them figure out what does that look like, how do we deliver on that? (Instructor N)

  I attend to learning styles and provide people opportunity to learn at their comfort or deliberately learn at their discomfort. I have a stated objective, and test to see if that stated objective has been met. (Instructor H)

Summary of code 14: High Expectations

Good lead facilitators aspire to transformation or some level of change for students – there's a presumption that the institute experience will change them or that they need changing, redirection, or empowerment. They expect change and possibly transformation. Good leads want to help with a powerful learning experience. They're committed to students but they want the experience to change the students. They believe that these students are going to fix the fragmented worlds in which they live; good leads recognize this and help students get the skills

and explore the issues enough so that they can go about fixing things. They play a role in identifying students' potential and are focused on moving students to the next step or level. Good lead facilitators reconcile their own high expectations as well – there are program expectations, student expectations, and facilitator expectations they must manage and they are smart enough, present enough to recognize when some part of any of these is not going well. Good lead facilitators recognize their leaving their mark – they're in it to help students and to help colleagues in helping students but they want to influence and persuade institute students to be better, know something, and change.

Summary of codes 11 – 14: What good teachers expect of their students

Four of the 27 codes fall under this question of what good teachers expect of their students, and include: Critical Thinking, Questioning, Trust, and High Expectations. Of these four codes, the lead facilitators in this study identified all of them. In sum, this resulted in 123 applications (occurrences) of code of the 1,328 total, or over 9% of all applications (occurrences) under the research question of what good teachers expect of their students.

Research Question #4: What do good teachers do when they teach? (Codes 15 – 21)

Seven of the 27 codes fall under the research question of what good teachers do when they teach, and include: Student-Centered, Conducive Learning Environment, Personal Disclosure/Vulnerability, Passion/Enthusiasm, Humor, Energy, and Clarity and Effective Communication. The codes are ordered and prioritized (highest to lowest) based on their frequency of application (occurrence) from the 15 transcribed interviews with good lead facilitators from the four programs in this study.

Code 15: Student-Centered

The Student-Centered code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it was also highlighted in institute programs by the lead facilitators themselves. This led to 196 applications (occurrences) of this code, ranked 1st by number of mentions by lead facilitators and all 15 leads identified its importance.

> *I want them to realize that they have an even bigger potential than they thought. (Instructor F)*
>
> *The curriculum is less important than the relationships. (Instructor J)*
>
> *I'm going to do everything I can in my power to make sure they get it. I'm invested. (Instructor B)*
>
> *That they are whole, complete, and brilliant as they are. (Instructor A)*

Careful review of applications (occurrences) of the Student-Centered code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators bring forth lessons and gradually move students to a place where they can apply the lessons and analyze the application in their context back home. They recognize the reasons for which students come to institutes and capitalize on these reasons. They know ultimately that they are tasked with training students on content and helping them come to not only know but apply the content.

  > *I hope you've changed somewhat by being at this thing for six or seven days. What does that mean for you and how do you make meaning of that and how does it impact the people that weren't here that you're going to go back and be in community with? (Instructor B)*
  >
  > *Develop an appetite to know about themselves; to be more self aware but to not stop there. And than to be more aware of how they interact with the world, how they go forth and bring change, how they go forth and lead. (Instructor E)*

I would like them to be able to think about the world differently as a result of that experience or their experience with me. (Instructor I)

That's my favorite thing about students. When you can just see some movement along that continuum. Maybe it's that I like a project, but when it's by appearance and assumption, some of the hardest students to reach, that's the most fun for me. But at the end of the day, the thing I like most is when they just get something, and they enjoy having learned something, and that it applies to their life, which hopefully anything they're talking about in that environment does. (Instructor N)

- Good leads believe in students. Their faith often goes well beyond what the students see possible for themselves. Good leads help students imagine a new world of possibilities.

  I want students to believe that they are powerful and brilliant and are here for a purpose and need it. I want them to believe in themselves, that their minds work, that their experiences matter and that while theirs may not be what someone else's is, it does not make them any less important or significant and that they have the potential and the capacity to really make a difference in the world. (Instructor D)

  I also want them to believe that the world is better because of them, specifically, that they have good characteristics, and good thoughts, and good abilities, and they will make they can make good contributions to their families, in our communities, and our institutions, so each of them is unique in that way. (Instructor I)

  They have the ability to be whatever they want to be and that they are enough just as they are and that in of itself is enough to bleed into the second one which is you can make any sort of change you want. That their impact on the world is larger than they even can realize. (Instructor E)

  I want them to believe that they are capable of whatever they need to be capable of. I think that's hard because it's very individual, but in a very broad sense, I want them to believe they're capable of leadership. (Instructor N)

- Good lead facilitators teach and facilitate from a passion for students. Their approach is student-centered which manifests itself in their words and actions.

  I see myself more as a facilitator. Facilitators hold space and create space and the wisdom in the room is already there. (Instructor A)

  That they matter. And to follow that trail then, is why. What do they believe in themselves? What do they love about themselves? (Instructor C)

  Here's how I am doing these things. Here's why this is valuable. I'm at best at taking something that at first glance may look complicated to them and dicing it up so that they

leave with the most important things and the concepts, so they can act on that tool or that practice and actually bring it to life. (Instructor M)

What I want them to learn will change based on how much I'm really able to identify with where are they, where they want to be, and where are they next, and it's holding myself in check that's not where I think they should be, or where their next step is. (Instructor C)

- Good leads get to know students on a personal level. They utilize casual, off-curriculum times to learn what's going on in their lives.

  My commitment is to show up and be engaged with those that are there. (Instructor E)

  Give them the time to be together and enjoy each other's company and have some fun. But also get them to start looking toward whatever that is they're going to do next. (Instructor J)

  It's important to reach out and make individual connections. It's important to focus on community and not just for our students, but for our facilitators. (Instructor F)

  I'm more casual and really trying to focus on building the relationships and building credibility with the students early on, from being a listener and spending time with them off session time and really sitting next to different students at every meal. (Instructor M)

- Good lead facilitators know that first impressions matter. What they do at the beginning helps to set the tone for the rest of the experience.

  Trying to get everyone to center their thoughts and relax, so they can be open to what they're about to receive and give to others. Framing and context as to how and why we're here; and then secondly my mind, let's have everyone take a breath from the chaos of arriving, getting here the night before and now understand that we're all here, we're never going to be able to replicate this again. Let's take a deep breath and let's go all in. And so helping to create a calm. (Instructor L)

  I want to see people connected to each other, and how do we do that best? That is a goal for me to see folks connected and feel heard. That is what leads my teaching in that way. (Instructor A)

  How do you make sure that you are then opening up that space to everyone? That's probably the number one challenge and that's why it … comes back to the full environment. How is that a place where we're all learning? (Instructor C)

  I believe that your first interaction with me determines how you're going to respond. I try with every student to have a real hello, a proper welcome, a thank you for being here and here's what it's going to be like moment. (Instructor H)

- Good leads know how to help students think, act, and be different. They make the curriculum and the institute experience personal to students and their background.

  Make it real, make it personal, make it about them, in the context of their life. (Instructor L)

  If it's not relatable they just don't know how to apply what it is that you're trying to teach. (Instructor G)

  It's personal, and needs to be treated personally, which is reinforcing everyone that's there, regardless of whether they interacted in the program in an isolated way, meaning basically they were there in name only and they showed up, they were a warm body. (Instructor L)

  You have to tie it to their personal experiences. To encourage their interest in it, it has to be relatable to what they're experiencing. If they can't relate to it … tie something personally that they've experienced, or observed, or witnessed, then I think it becomes really, really challenging for them to become interested at all in what you're talking about. (Instructor G)

- Good lead facilitators identify that they have knowledge and that they have ideas they can share but it's about people "showing up in the space" as a co-educator. They recognize their responsibility to help student leaders increase their skills, become more competent, and more confident.

  Have a student share a personal story about something they were struggling with, or their family … it just made the experience very much about that student at that moment for that personal challenge they were dealing with, which … you really couldn't predict that he was going to share that, right? (Instructor M)

  I want you to actually be in there and keep your brain going all the time. (Instructor A)

  Setting up that dialog among each other is much more effective than me telling them what to care about or telling them to ask themselves that. There are times when a well-placed statement about, you should think about this folks, is important, but I think the best way to encourage interest in that is to find it in someone, and let the other participants see that one of their peers is interested, and make that normal, and make that OK, and then dig into that a little bit. (Instructor N)

- Good leads know and use students' names. While seemingly obvious, they know that it helps students feel and become more comfortable in the learning environment.

  I start to practice the names. I start to figure out who do I know in this group? Who do I not know in this group? What assumptions do I have about people in this group so I can let go of those immediately and try and let them show up. I believe names are really important and I try and do the most I can to figure that out beforehand. (Instructor C)

  I do make a point to have a moment with each student once per day. Interestingly enough, in the last ten years, I can name every student in a session by the end of the first day and I can call them individually by name, by nickname, or by trait. (Instructor H)

  I make a promise to myself that I will engage with all of the students in the group, to learn their names. I feel like that's really important especially if someone who is not the most outspoken and not in the front … I want to make sure that that I'm acknowledging that those people are in the room and that they are participating to the group even if it's in a different way than the person at the front with their hand raised all the time. (Instructor J)

- Good lead facilitators work to think about things from the students' point of view. They put themselves in students' shoes and use this approach as another connection.

  I've found I've been able to be best prepared when I can go there and really mentally say … well, if you were a student, what would it take for you to learn the most important bullet points that I know I want to get across? (Instructor M)

  Put yourself into the shoes of a student that's coming to a program … I try and remember what I was like as a student in that experience and where I was in my development and what I needed from that experience and while I don't necessarily think that I'm a representative of the current students I think that approaching it with some of those perspectives is helpful. (Instructor I)

  How can I make this relate to this population, to these students? (Instructor D)

- Good leads focus on being present in the institute and in their conversations with students. They take their time and investment seriously.

  That means being ready to be removed from your day-to-day life, whether that's personal, professional, changing your schedule to meet the schedule of the institute. (Instructor N)

How do you show up, and how engaged you are, and how invested you are. I think that's a really important thing. (Instructor B)

Being prepared to be present for what their questions are, their needs are, the energy of the group, but at all times grounded in where we're going. (Instructor C)

- Good lead facilitators help "make it real" for students. They know that real-life and accessible examples lead to better understanding and application of theoretical concepts or constructs.

  I like them helping me keep it real. I like them teaching me things about who they are, and what's cool and what's hip and what's not for me. But, I like knowing that we're still needed. (Instructor F)

  Make it … more relevant and real for the students. (Instructor O)

  I try to make connections in my head to translate things and make them more real. (Instructor A)

- Good leads are invested in a shared learning experience. They value relationships. Because they value being student-centered and relationship building, they become a better facilitator.

  Honestly, I've liked the most, the ability for students to teach me. (Instructor M)

  I want to go there and learn from other people. I want to learn from the other facilitators and I want to learn from the other students and what they're doing at their schools and to be able to bring that back here. (Instructor J)

  That we are brilliant, that we want, we are good, that we want change, that we … can have hope together in a community. They have taught me that. (Instructor A)

- Good lead facilitators check their ego at the door. In doing so, they allow the students to be fully engrossed in their experience.

  Your personal struggles and challenges shouldn't trump their experience and what they're feeling. (Instructor M)

  My ego got moved back. It so became less about me, and that is the first thing I do. (Instructor A)

When I am than facilitating it's about the participants and not about me having the experience. (Instructor E)

- Good leads provide appreciation and encouragement. They know that this is key to helping students stay motivated toward their visions and goals.

  I want people to feel like they have small wins. (Instructor A)

  Giving them praise for doing it, and if they don't, it's giving them positive encouragement and encouraging their peers to give that person some encouragement. (Instructor M)

  They hear my appreciation. (Instructor D)

- Good lead facilitators work to stay relevant. They know that the more they can understand a student's world, the better they will be at teaching and facilitation with them.

  It's important to stay hip and stay cool. It's important to stay true to myself … I'm kind of dorky cute and that's just how I am and you can love it or hate it and move on. I'm most effective when I show my true personality and I get people's attention. (Instructor F)

  I will use today's vernacular rather than proper English. They will know that I can communicate … but when we're getting real, it's gonna be in their terms. I'm careful not to blur the line of, I'm not one of them, but I have found that I can elicit a better response when I drop either slang or today's-speak to create a realness and to cut through any type of attempt on their part to B.S. me. (Instructor H)

- Good leads demonstrate commitment to students in the institute and some maintain that commitment over time by adopting the role of mentor.

  You're willing to be part of their lives as much as they want to invite you in to be a part of their life. (Instructor G)

  Even weeks later, of email, of 'so where are you on this?' I think that that's where social media has increased that learning, increased the ability for that connectedness for learning. In the old days, they would have been more effort than I wanted to put in, but nowadays it doesn't take any effort. I can connect with you instantly. As it comes in my mind, I can just as quickly put it back out there in the universe. (Instructor H)

Summary of code 15: Student-Centered

Good lead facilitators bring forth lessons and gradually move students to a place where they can apply the lessons and analyze the application in their context back home. They recognize the reasons for which students come to institutes and capitalize on these reasons. They know ultimately that they are tasked with training students on content and helping them come to not only know but apply the content. Good leads believe in students. Their faith often goes well beyond what the students see possible for themselves. Good leads help students imagine a new world of possibilities. Good lead facilitators teach and facilitate from a passion for students. Their approach is student-centered which manifests itself in their words and actions. Good leads get to know students on a personal level. They utilize casual, off-curriculum times to learn what's going on in their lives. Good lead facilitators know that first impressions matter. What they do at the beginning helps to set the tone for the rest of the experience. Good leads know how to help students think, act, and be different. They make the curriculum and the institute experience personal to students and their background. Good lead facilitators identify that they have knowledge and that they have ideas they can share but it's about people "showing up in the space" as a co-educator. They recognize their responsibility to help student leaders increase their skills, become more competent, and more confident. Good leads know and use students' names. While seemingly obvious, they know that it helps students feel and become more comfortable in the learning environment. Good lead facilitators work to think about things from the students' point of view. They put themselves in students' shoes and use this approach as another connection. Good leads focus on being present in the institute and in their conversations with students. They take their time and investment seriously. Good lead facilitators help "make it real" for students. They know that real-life and accessible examples lead to better understanding and application of theoretical concepts or constructs. Good leads are invested in a shared

learning experience. They value relationships. Because they value being student-centered and relationship building, they become a better facilitator. Good lead facilitators check their ego at the door. In doing so, they allow the students to be fully engrossed in their experience. Good leads provide appreciation and encouragement. They know that this is key to helping students stay motivated toward their visions and goals. Good lead facilitators work to stay relevant. They know that the more they can understand a student's world, the better they will be at teaching and facilitation with them. Good leads demonstrate commitment to students in the institute and some maintain that commitment over time by adopting the role of mentor.

Code 16: Conducive Learning Environment

The Conducive Learning Environment code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it was also highlighted in institute programs by the lead facilitators themselves. This led to 115 applications (occurrences) of this code, ranked 2nd by number of mentions by lead facilitators and all 15 leads identified its importance.

The free exchange of ideas without judgment, and evaluation. (Instructor L)

We're in this environment for a purpose. (Instructor H)

In any learning environment I try to create this idea about sacred space. (Instructor C)

The intentionality of the process will create the learning moment. (Instructor H)

I create space for thought … for feeling. (Instructor A)

Careful review of applications (occurrences) of the Conducive Learning Environment code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators always are considering what's happening in the learning environment. They empower students to teach and to learn. They foster a safe environment in which people understand they have a responsibility to help others around them learn.

  It's really important to set up a safe and a co-learning environment. At the same time that they really feel like that they've got someone who is holding the process … so that they can wade into uncomfortable waters and feel like they're not going to be out there and drown. (Instructor D)

  I want them to realize their full potential and I think that in an institute format that is the safest, best, most amazing, opportunity to do that. (Instructor F)

  Letting the students know that I'm watching the facilitators too, is a way to create a safe space for the students. No one's immune from learning here. Or exempt. (Instructor I)

  That's how I try and set up the small groups … talking about what a safe environment is … what we're going to do and what we're going to engage and people have a right to speak and that's OK. We're going to treat people with respect and we're going to be honest and we're going to agree to disagree on things and that's what it means. Having an education to me is about being able to disagree with someone and articulate that in an educational way, in an intellectual way not name calling and fists. (Instructor K)

- Good leads know they must help set a solid foundation for learning with ground rules and shared expectations. They see this as important and fundamental.

  Giving everyone an opportunity to at least hear a name and a face and maybe something about somebody … I don't expect everyone to be best friends at that first point; but knowing my name, hearing their names, giving everyone an opportunity to start that process is important. Laying the ground rules for the experience; because there have to be ground rules, is important. What some of those legal issues are, what some of those non-flexible or parts of the arrangement are; are really important to set up front. (Instructor I)

  Naming that as the kind of environment that we're creating, so again in terms of setting up norms and ground rules and 'this is a learning space and we will all potentially make some mistakes or not get it right every time or be confused or have a different perspective and that's what this is all about.' (Instructor D)

  Until our foundation is set, and until even the house mom or the house dad or the cook, until everyone understands that is what we are creating, we're not ready to let the

students come in. So before the students even get there, we have to have that foundation. (Instructor F)

- Good lead facilitators have exceptional awareness of what her/his students are getting and how they are contributing to the experience. They recognize the role that all play in creating an intentional learning environment.

  We have the responsibility to set up an environment, because if we don't we're going to miss out on something, and it's got to be seen as an equal environment. We talk about teacher/learner thing and that's true. But, it's got to be seen as … we're all here together, we're riding the rollercoaster together. Some of us will be in the front sometimes, some of us will be in the back sometimes, but we're all on the ride, and our responsibility is for everybody on the ride, not just the person sitting next to you or the person who is behind you or in front of you, but it's everybody. (Instructor B)

  You create an environment that's nonjudgmental, intentional, transparent. (Instructor H)

  It's more than I can use the buzz words. It's seeing students internalize concepts and that appears through their speech. That appears through the way they talk about concepts and ideas about themselves, about their organization. Behavior changes. I can see some behavior changes as the week goes on if learning is happening, because I think in an institute environment when learning is happening, comfort is increasing for those participants. (Instructor N)

- Good leads foster connections and build community among students and other facilitators. They empower all in the learning environment to contribute and educate.

  I'm not your mom, but I am your big sister. It's my job to help. It's my job to listen, it's my job to learn, and it's my job to be a part of that active community. That's what makes me a good facilitator is that I am focused all the time. Ultimately we are in the same family and so I'm open to learning as much as I am to teaching. (Instructor F)

  We're going to push you, and it's OK for you to push back with us, because there definitely is that student facilitator dynamic, but we also want it to be a sense of community. (Instructor M)

  My number one goal is that we create space and that that has to be all of our responsibility for each … to each other and how we connect with each other. (Instructor C)

- Good lead facilitators know they must create a safe and nonthreatening space where students are allowed to make mistakes and fail for real learning to occur.

(The) very first time someone does something in the large group that could be failure, or seen as not what I agree with, or incorrect, or offensive, how you respond to it makes all the difference in the world. (Instructor C)

You have to humanize the entire experience. You have to create an atmosphere that it's inevitable that we're going to screw up. We're going to screw up. So let's think about, how that looks in a place like this versus out there, wherever out there is for you, and how do we learn from that? Better that it happens here than when the stakes are a lot higher. (Instructor B)

In a program like I-LEAD®, I don't think there's really an opportunity to fail, unless they do something that grossly disobeys the rules … they're learning the whole time and in that situation I don't think that students fail. They learn … I mean they might learn something and reevaluate it and then try it a different way but … they're not going to get a grade. (Instructor J)

- Good leads recognize the importance of the physical space of learning. They give time and attention to the space in order to create optimal conditions for learning.

  Having the materials, is the room setup, how's the temperature, is there a clear understanding of where we are and where we need to be, and the goals and outcomes associated; making the assumption that all of that is equal regardless of the person. (Instructor L)

  You've got to be able to change up the environment so that you're either getting out of the facility that you're in, or that you're seeing some place different, or doing something different. (Instructor G)

  Space is so important. If the lead isn't comfortable in that physical space or that mental space, but more importantly physical space, can it greatly suck if you know they don't have their feather pillow? I don't know. Because I feel that way about the participants. It's really important that that be taken care of for the participants to learn, to a degree. I mean, I don't expect to do an institute at the Four Seasons or anything, but basic needs to be met for them to learn. (Instructor N)

- Good lead facilitators approach their role as an educator, are on the same learning path as students, and understand they are a learner. They share voice: their dispositions, skills, and environment all coalesce to create their facilitative approach.

  Making sure that we're encouraging multiple people to speak and calling on people that either haven't spoken before or may not even be raising their hand and just checking in with them and giving them the opportunity to say something. (Instructor I)

I come to that space believing the wisdom's in the room. I come to that space believing my most important job is for them to recognize that and to voice that. Now it will only come through their voice, not my voice. I take it very seriously. (Instructor C)

Some of our most powerful conversation is around a student who shares something and then saying to the larger group 'what do you people think about that?' I mean I know what I think about that and for most students I can out-talk, out-wit them, just based on my life experience but does learning really happen if I out-wit them and put them in their place in front of seventy of their peers? Not so much. So really helping the audience to challenge the other participants to challenge each other. (Instructor E)

- Good leads like environments that are fun. They know that this encourages students to let their guard down and be open to learning.

  It's helpful just too kind of loosen any tensions that might be there, let people talk and kind of form some relationships. (Instructor J)

  I'm smiling, I'm cutting jokes, I'm with the participants wherever they are, wherever they need to be. (Instructor O)

  We're working now. We're playing now. We can have fun while we're doing both. (Instructor H)

- Good lead facilitators approach the environment as learner. They honor the role of the participant. They are shared learners and they share the ownership of the space.

  It will be a shared learning space and you hope to learn as well as be one who's facilitating learning and holding the learning experience for them. (Instructor D)

  We're very intentional about setting up the space and the timing so that they can maximize their understanding. (Instructor N)

  What I immediately think of when I teach, when I facilitate – I create space and hold space. (Instructor A)

- Good leads know that if students aren't personally comfortable, learning is much more difficult. They work to create a setting that's conducive for students' well-being.

  I can't guarantee that they do feel comfortable, but my effort is just to be welcoming and genuine and to speak to them instead of standing and sort of watching folks roll in. Helping them get acclimated, taking care of major needs, where I am going to eat, where

am I going to sleep, who am I, am I in the right place, I think those Maslow hierarchy things are important in making them feel like they're in the right place. They've got some place safe to stay, we're going to take care of them and then they have to take care of themselves too … it feels very basic, but I think it's important. (Instructor N)

We have a very ideal setting for productive conversations. We have an opportunity to make a family atmosphere to have the best of the best come together and be real, be realistic, be idealistic; but come up with a plan of action. (Instructor F)

- Good lead facilitators value exploring questions together with students. They recognize that "truth" often depends on life experiences, but understand that balance is needed.

  Giving them the opportunity to ask questions and to feel like they can ask questions and not feel like it's a stupid question, or not feel like they shouldn't be asking questions. (Instructor J)

  I try and translate that to the students that everyone's on a different path and I don't have answer but collectively we all might have the answers together and we can explore what the answer might be. (Instructor K)

  I have to be so familiar with it that I can see when they're not getting it and by them I mean: the audience, the students, the group that I'm with small or big. That we can take their different learning styles and expectations and real world experience to allow them to latch onto what they need to take away from this so that we can continue that institute process this while learning together. (Instructor F)

- Good leads have hopes for students. They desire for students to aim to be significant contributors in their environments.

  I want them to believe in themselves and I'd like them to believe that they can make a difference. I want them to believe that they can make something even better than it already is. (Instructor F)

  I hope as a result of the program their … understanding and the confidence to act on that understanding, is what's important. That should obviously fuel their passion, fuel their ability to act, to engage others, to bring up issues, to back off others, to identify what's important, what isn't, how to grow and develop as a person, and do the same for others. (Instructor L)

  It's important for students to see small wins and to see small movement. Over the course of six days a student might not have life their life changed, they might, I don't know; but just to notice the things and celebrate them. (Instructor J)

Summary of code 16: Conducive Learning Environment

Good lead facilitators always are considering what's happening in the learning environment. They empower students to teach and to learn. They foster a safe environment in which people understand they have a responsibility to help others around them learn. Good leads know they must help set a solid foundation for learning with ground rules and shared expectations. They see this as important and fundamental. Good lead facilitators have exceptional awareness of what her/his students are getting and how they are contributing to the experience. They recognize the role that all play in creating an intentional learning environment. Good leads foster connections and build community among students and other facilitators. They empower all in the learning environment to contribute and educate. Good lead facilitators know they must create a safe and nonthreatening space where students are allowed to make mistakes and fail for real learning to occur. Good leads recognize the importance of the physical space of learning. They give time and attention to the space in order to create optimal conditions for learning. Good lead facilitators approach their role as an educator, are on the same learning path as students, and understand they are a learner. They share voice: their dispositions, skills, and environment all coalesce to create their facilitative approach. Good leads like environments that are fun. They know that this encourages students to let their guard down and be open to learning. Good lead facilitators approach the environment as learner. They honor the role of the participant. They are shared learners and they share the ownership of the space. Good leads know that if students aren't personally comfortable, learning is much more difficult. They work to create a setting that's conducive for students' well-being. Good lead facilitators value exploring questions together with students. They recognize that "truth" often depends on life experiences, but understand that balance is needed. Good leads have hopes for students. They desire for students to aim to be significant contributors in their environments.

Code 17: Personal Disclosure/Vulnerability

The Personal Disclosure/Vulnerability code was first identified by students in my early research project about student perceptions of good lead facilitations in institutes but was also reinforced and supported by lead facilitators themselves. This led to 71 applications (occurrences) of this code, ranked 5th by number of mentions by lead facilitators and all 15 leads identified its importance.

If we are asking them to be vulnerable, I promise to do that as well. (Instructor N)

It's about self-disclosure and appropriateness. (Instructor F)

To understand who they are and that I understand who I am. (Instructor D)

The willingness to come and share a piece of who I am with them. (Instructor E)

Careful review of applications (occurrences) of the Personal Disclosure/Vulnerability code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators are not afraid to share where they have fallen short. They take the learning personally and help students move from knowing to understanding to applying to analyzing how it fits in their lives. They are not about ego and give selflessly to ensure the experience is good for all involved.

  I'm not afraid to share just deep personal struggles and challenges that I've had, whether it's as a student leader or as a person, or in my own family. (Instructor M)

  I have made a slew of mistakes in my career in my personal life and that's great because I've always thought that making those mistakes means that I'm going down a path that others haven't been on or I'm challenging something that has not happened. (Instructor K)

  I'm not afraid to talk about myself and I don't mean that in the sense that I'm constantly talking about myself, but if there's a moment to use myself as an example I will use it. I

think that by putting myself out as the example of how people can change or how people can grow, that helps students own that they can do that too a little bit. (Instructor I)

You can throw yourself out there, like, I've screwed up a lot, you make yourself vulnerable in front of everybody and as long as you can do that without making it about you, that's really important. (Instructor B)

- Good leads are willing to risk looking good by putting themselves out there and being vulnerable for the sake of learning. They talk honestly about their struggles, successes, and expertise.

  I am willing to be vulnerable with students and to challenge them to go to that place. (Instructor E)

  If you acknowledge that you too are grappling with the same questions that they are, that helps them understand … go, hmmm, if he's still grappling with that I shouldn't feel so badly that I am. Whether that's a vulnerability piece or not … you need to make sure they understand that … you're right there with them struggling with the same stuff they're struggling with. Maybe different stuff, or life experience, or whatever, but … you're still struggling with it. (Instructor B)

  It actually doesn't matter how much knowledge I have. The challenge is, to be that vulnerable and yet not evaluate yourself based on the individual. (Instructor C)

- Good lead facilitators use themselves as an instrument for learning. By sharing their life experiences, it allows the students to see an example right in front of them.

  I certainly don't want to come across as processing is all about me putting myself out there but … if I can relate particularly in tough situations an experience that they are having or that they've had I can emphasize with that by using myself as an example. (Instructor I)

  Being able to share with them: here's who I really am, here's who really matters to me, here's something that I'm really working on and being able to set that tone for it. (Instructor E)

  I … am human as well. I'm not just this person up here trying to tell them what this book says I'm supposed to tell them, whatever is in this binder, but that these are real life experiences and leading, being an effective leader, is about life, not just the context of the organization. (Instructor M)

  I'm not trying to present only the Facebook version of me, that I'm not trying to craft it up to look a certain way. I want you to actually see the whole thing, so that you can

continuously think and remember that human beings are not one-dimensional. (Instructor A)

- Good leads know students individually and use this information to make connections and share relevant stories that improve learning. They pride themselves on the skills they have to take good curriculum and make it great through their facilitation.

  Life experiences, professional experiences, personal tragedies and success, all that stuff goes to make up what is the individuals credentials. (Instructor L)

  I like to share stories and share personal examples because, I know I did as a student, they see someone in this position or have a professor or something like that, and you think that they've never made a mistake. You think that you know that they've always been that person and that they never screwed up, and they always knew what they were going to do. I like to share stories with them to help them know that that's not true. That you can still be in that position and be someone that screwed up before, it's really OK. I think that's important. (Instructor J)

  I'm quick to jump on that and talk about how that translates back to our own lives, our own work, our own personal experiences, and our own journeys. I'm on my own journey and it took me a long time in my career to realize that I wasn't in competition with anybody else. (Instructor K)

- Good lead facilitators are skilled at creating a learning sanctuary for students' optimal education. They know the right space removes threats and allows for open exploration together.

  There's something so unique about an institute where you're just so tied to the people that you're experiencing this with. You're living with them, you're eating with them, you're playing with them, you're showering in the same facilities. Everything is there's, you're sharing a piece of your life, which is a lot different in my opinion than like a sixty or seventy-five minute thing. (Instructor G)

  I want to create this space for people to do their best learning … so if that means modeling vulnerability, modeling not knowing. (Instructor D)

  I can share a little bit more than maybe I initially wanted to share because this is a place where I'm you know part of a family. (Instructor K)

- Good leads know that part of role modeling is offering up and disclosing your thoughts first. By appropriately showing their cards first, it helps to remove perceived power.

I think disclose, not necessarily hot buttons, but disclose things that get under your skin around the flow of the week. (Instructor B)

If that means saying up front, I've never done this before but I'm going to give it a try, if that means being willing to fall on your face and pick yourself back up. (Instructor N)

That they could describe me to another person accurately; that they would know either assumed or real what my values are, what I care about, how I treated them, what lights me up, and what sets me off. They would have felt that because they interacted with me both in the big group and individually. (Instructor H)

- Good lead facilitators are generous and love to share what they are passionate about with students. They know this helps grow students' appetite for learning.

  I want them to know the things I love to do. So for example, I love facilitating the debate. Regardless of what you call it, I love facilitating. (Instructor F)

  I still … engage. I love that and I feel like then that gives students an opportunity to know you. The best relationships that I've had with people and the people that I've learned from are people that I've known personally. I try and have that relationship with students. (Instructor K)

  When I get to facilitate, I feel really lucky because I get to share my beliefs. There are a lot of times where I don't get to share what I believe, but in facilitation land, I get to take students through the process of learning about leadership. (Instructor F)

- Good leads set and keep appropriate boundaries. They recognize that by establishing a personal, yet professional, relationship it keeps the focus on the learning.

  Clearly define your personal boundaries. (Instructor H)

  I'm not their peer … I'm definitely there in a different role and a capacity and recognizing that I think becomes important … you can, of course, be real with them and share stuff about yourself if they ask. (Instructor G)

  I'm pretty open with students about my life and my family and my work and obviously always setting appropriate boundaries; but I like to have a very open relationship. (Instructor K)

- Good lead facilitators illustrate concepts by bringing in and sharing relevant and timely stories that make real connections with students. They know that by attaching the new concept to something that is already familiar, it increases students' learning.

Do I have an example? Whether it's of my own personal lived experience or what I learned or heard from someone or something I saw on television or in a movie or something. (Instructor D)

Many of the examples that I share are from my examples as a leader and what I've experienced and what I've learned and continue to learn as a leader and as I continue to lead at different levels and in different spaces. (Instructor D)

Always checking in around the fact that they're getting what I am trying to convey and having them say more about how they are getting it, sharing examples. 'OK, how does this come alive for you?' 'Where have you seen this?' 'How is this familiar?' Off the theory, off the model, off the framework, into your life. (Instructor D)

Summary of code 17: Personal Disclosure/Vulnerability

Good lead facilitators are not afraid to share where they have fallen short. They take the learning personally and help students move from knowing to understanding to applying to analyzing how it fits in their lives. They are not about ego and give selflessly to ensure the experience is good for all involved. Good leads are willing to risk looking good by putting themselves out there and being vulnerable for the sake of learning. They talk honestly about their struggles, successes, and expertise. Good lead facilitators use themselves as an instrument for learning. By sharing their life experiences, it allows the students to see an example right in front of them. Good leads know students individually and use this information to make connections and share relevant stories that improve learning. They pride themselves on the skills they have to take good curriculum and make it great through their facilitation. Good lead facilitators are skilled at creating a learning sanctuary for students' optimal education. They know the right space removes threats and allows for open exploration together. Good leads know that part of role modeling is offering up and disclosing your thoughts first. By appropriately showing their cards first, it helps to remove perceived power. Good lead facilitators are generous and love to share what they are passionate about with students. They know this helps grow students' appetite for learning. Good leads set and keep appropriate

boundaries. They recognize that by establishing a personal, yet professional, relationship it keeps the focus on the learning. Good lead facilitators illustrate concepts by bringing in and sharing relevant and timely stories that make real connections with students. They know that by attaching the new concept to something that is already familiar, it increases students' learning.

Code 18: Passion/Enthusiasm

The Passion/Enthusiasm code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it was also highlighted in institute programs by the lead facilitators themselves. This led to 68 applications (occurrences) of this code, ranked 6th by number of mentions by lead facilitators and 13 leads identified its importance.

It has to have some of my own passion. (Instructor L)

To really capture people in engagement. (Instructor O)

They see me as an engaged, passionate, teacher. (Instructor D)

It's my responsibility to hit it out of the park. (Instructor A)

It's in my blood. (Instructor B)

Careful review of applications (occurrences) of the Passion/Enthusiasm code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators imagine that students will help change the world. Because they do, they approach every interaction with students as another opportunity to support them in doing so.

  I need them to recognize they matter because that's what's going to save our world. That's what's going to help our world. (Instructor C)

The expectation is that you will leave that world, wherever, in a different place. In a better place … so what is that? What's your contribution to that? I don't care if it's your fraternity. I don't care if it's India. To me they're the same thing. If you're passionate about that, leave it in a better place than when you found it and, it's not even about leaving your mark, it's more around just creating that forward momentum for that to be a better place than it is now. (Instructor B)

They can learn that they can maybe make the world a better place. (Instructor G)

This energy of the world needs to show up in our relationships of learning. So it damn well better be good. (Instructor C)

- Good leads don't shy away from sharing their emotions. They recognize that emotion evokes a response from students and engrosses them in the task at hand.

  I have fun … I have fun because I love this. I honest to God feel like I have the best job in the entire world. (Instructor F)

  It's kind of one those all of us together … you want to breathe this emotion … just like comes out of you. You can't do that … for like a two day conference, it's just not going to work … you defiantly have to put on much more of the emotion hat. (Instructor O)

  There is so much potential in people. I want to assist in that birthing process of that potential. That's why I teach. That's why I love education. That's why I love having people think, and be together. I do LeaderShape® because that potential put together with possibility and that just brings tears to my eyes of joy! … that's like the best stuff ever (Laughter). I really could cry about this. Watching people … really be in community and … hold that the world can be great and really, really believe that. They may forget it and not believe it the next hour that they leave … but they felt it for just a little bit, and I love that. I love being a part of that birthing process … I'll be a midwife to people birthing their greatness any day. So that's why I do LeaderShape®. That's why I keep coming back. (Instructor A)

- Good lead facilitators give and invest 100% in every way. They reorganize their life so that they can be fully present to and for students.

  I've got to go varsity all the way and if I don't they're going to know it and I'm going to know it. (Instructor B)

  I'm willing to give 100% of myself at all times throughout the entire institute; even if it means staying up til four a.m. (Instructor F)

  I'm going to fully show up to this and I promise you that … I'm not halfway here and my hope is that you're doing the same and that we do that together.' (Instructor C)

They are the most important thing to you at that particular time. If you're not invested in them and engaged in them and ready and willing to kind of make their day, then you ought to pack up your stuff and go home. (Instructor G)

- Good leads are persuasive. They take students to a place where they didn't know they were going. They are resolved to help students be better. Good leads often don't like students who don't want to be there or feel forced to be there; they don't tolerate not caring. But good leads often know how to win over these students. They seize the intensity of the experience. Good leads know how to use these experiences to foster an environment of learning.

  It is great to be passionate about something. It is great to care about something so much that you would lay down on railroad tracks for. That's really important and powerful. (Instructor B)

  So in teaching, I'm constantly trying to think about, do I understand it first? Do I understand how and why this is important to others; because if I understand its importance, then I'm going to have more passion about it in the delivery, which will probably enhance or increase the likelihood of its comprehension, or adoption, by others. (Instructor L)

  Show me that you are caring about this enough. It doesn't have to be the way we conceptualized it, but show me that you are putting the effort into it. Everybody's talents are unique, but I have to see the effort. (Instructor F)

- Good lead facilitators give energy to the group. They are perceptive and can sense what the group needs often before the students realize it for themselves.

  We're going to greet the buses when they're there. We're going to be excited that they're there. We're not going to be sitting around on the couch, we're going to be talking to them. We're going to be active and engaged. (Instructor G)

  I do have a responsibility to re-energize them. (Instructor H)

  Well tell me a little about yourself and then genuinely being interested in what they have to say. I am fortunate that for me that's energizing because for some that can be very, very draining, even to people who are very, very good at it. It's taxing, and for me I find that to be very energizing, so it's a very easy way to set that environment. (Instructor E)

I get more energy from certain parts of the curriculum than I do others … if I'm not doing a part that gives me energy I figure out how I keep the energy in a section that's not necessarily … my favorite to do … I prepare like probably most other people in that we all have different systems of how we manage that massive manual and all that kind of stuff, but, I try to get myself in a place where … I'm ready to go and I need to be prepared to do the whole thing. (Instructor B)

- Good leads know why they do this. They think institutes provide one of the best formats to educate and empower students.

  Why I love to do it? … why do I keep coming back? I think I ask myself that constantly. It's for all the things I probably just talked about; but why do I love to do it? Why do I keep coming back to it? Something swimming around … I have chosen teaching facilitating, educating as a profession … if people give their time, they have chosen it; but, again that maybe connected to the why I love it question. (Instructor A)

  I am a strong proponent of intensive, focused, learning experience … that it is in those four, five, six day concentrated, focused, learning opportunities with a community of folks where we're engaged … where there is time online and time offline that deep learning happens and transformational learning happens and … not the only, but a best practice, absolutely. (Instructor D)

  I think a human-to-human connection with this curriculum is necessary. And I love it. (Instructor A)

- Good lead facilitators often look at their role as a performance and aren't scared to entertain. They know by doing this it can invite and invoke excitement in students.

  I would say … for me, to feel comfortable as a lead exercising some of the entertainment, the theater, and the drama is number one. But I would underpin that with … the human personal engagement. (Instructor L)

  There's a level of entertainment that happens. So I potentially entertain. (Instructor H)

  But nonetheless there's drama or there's entertainment that goes along with the story, the invoking of emotion. People can tell when you're upset, or when you're laughing, or using those things, and the passion to entertain. Being loud, that's not hard generally for me to be loud, but obviously there are other moments where you can capture it, by being at the opposite of that. Using all the senses that's how, typically I try and draw on the entertainment. (Instructor L)

- Good leads passionately believe in students. They feed off of the students' energy and it helps them be better.

What I do know is how to help you believe in yourself so that you can go solve them. (Instructor C)

They have taught me … the students themselves have taught me … that … yeah, human beings are great; they're awesome. Light and sparkly (Laughter); when given … a setting where community … even with the struggle can be created, we are like awesome! (Instructor A)

That energy to just, whatever they're doing, just keep doing it and … I think that's just great. I find that really, really invigorating, and exciting, and contagious, and all that. (Instructor G)

Summary of code 18: Passion/Enthusiasm

Good lead facilitators imagine that students will help change the world. Because they do, they approach every interaction with students as another opportunity to support them in doing so. Good leads don't shy away from sharing their emotions. They recognize that emotion evokes a response from students and engrosses them in the task at hand. Good lead facilitators give and invest 100% in every way. They reorganize their life so that they can be fully present to and for students. Good leads are persuasive. They take students to a place where they didn't know they were going. They are resolved to help students be better. Good leads often don't like students who don't want to be there or feel forced to be there; they don't tolerate not caring. But good leads often know how to win over these students. They seize the intensity of the experience. Good leads know how to use these experiences to foster an environment of learning. Good lead facilitators give energy to the group. They are perceptive and can sense what the group needs often before the students realize it for themselves. Good leads know why they do this. They think institutes provide one of the best formats to educate and empower students. Good lead facilitators often look at their role as a performance and aren't scared to entertain. They know by doing this it can invite and invoke excitement in students. Good leads passionately believe in students. They feed off of the students' energy and it helps them be better.

Code 19: Humor

The Humor code was first identified by students in my early research project about student perceptions of good lead facilitations in institutes but was also reinforced and supported by lead facilitators themselves. This led to 22 applications (occurrences) of this code, ranked 18th (tie) by number of mentions by lead facilitators and 12 leads identified its importance.

I think humor is very important. (Instructor B)

I try to interject some humor. I always try to interject humor. (Instructor G)

I have to switch it up. I mean use sarcasm for free. (Laughter) (Instructor F)

Humor goes a long way. Often self-deprecating. Being quick. (Instructor L)

Careful review of applications (occurrences) of the Humor code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators mix it up. They aren't afraid to be silly, goofy, or ridiculous with students. Good leads are quick to recognize when the curriculum allows for the funny moments that can help students to hopefully get to where they want them to go.

  I try to tackle it in a number of different ways and be funny. I try to be kooky and I try and be ridiculous so that way at least if people are laughing at what I'm saying that might engage them. As an individual I always used humor in my presentations, most of the time self-deprecating humor, in order to try and get people kind of thinking about topic or an issue. (Instructor K)

  I'm able to balance the seriousness of this work and the importance of this work with fun, joy and silliness. (Instructor C)

  The ones that are not afraid to, I guess for lack of a better term, be silly with students … and the group just responds to that. (Instructor E)

- Good leads manage a spectrum of emotions with their students. They can oscillate their facilitation when needed from seriously somber to seriously hilarious.

Via my style, they would have laughed and laughed hard. They may have cried, at least felt an emotional puncture, and they would have played at some point and been OK with that. (Instructor H)

Figuring out the best way to help them get to that learning journey. I think that it's part planning, it's part communication, it's part humor, it's part prodding and testing and playing devil's advocate, and a lot of those things. (Instructor I)

I come prepared and I come ready to work and I come ready to listen and to laugh and love and to be prepared that some students aren't going to send it right back. (Instructor F)

- Good lead facilitators recognize the importance of maintaining a light-hearted environment. They know by doing so it increases students' comfort and their willingness to learn.

  My goal is to try to infuse a sense of humor in the context of what's happening. I personally find that most things in the world are pretty funny, so if you can point out the absurdity of what's happening in the moment, it sort of lightens the mood and helps in the midst of some of that self discovery, I think can be kind of intense for people, and to be able to hold those two things in balance is a big piece of what I'm doing. (Instructor E)

  My smile has gotten me a lot of places in my life (Laughter) … to smile, to laugh, to have fun, to be light. (Instructor A)

  It's an environment that is caring, supportive, to a certain extent light hearted. (Instructor E)

- Good leads enjoy being with and around students. They use humor as a way to draw students in.

  You've got to have some laughter in there, you've got to have some this is going to be fun, instead of, oh my gosh this if five days of pure torture. (Instructor G)

  I'll just go lean on a chair talk to a few people, laugh, and ask what they have done, but it's kind of that human connection. (Instructor A)

  All that kind of stuff is just going to eat you alive if you can't see the humor in it. (Instructor B)

Summary of code 19: Humor

Good lead facilitators mix it up. They aren't afraid to be silly, goofy, or ridiculous with students. Good leads are quick to recognize when the curriculum allows for the funny moments that can help students to hopefully get to where they want them to go. Good leads manage a spectrum of emotions with their students. They can oscillate their facilitation when needed from seriously somber to seriously hilarious. Good lead facilitators recognize the importance of maintaining a light-hearted environment. They know by doing so it increases students' comfort and their willingness to learn. Good leads enjoy being with and around students. They use humor as a way to draw students in.

Code 20: Energy

The Energy code can be found as a key focus in in institute programs by the lead facilitators themselves in this study. This led to 19 applications (occurrences) of this code, ranked 20th (tie) by number of mentions by lead facilitators and 9 leads identified its importance.

> *Bringing a sense of energy and a sense of purpose to what were doing is a big piece. (Instructor E)*
>
> *Energy is something that I really pay attention to. (Instructor D)*
>
> *I have to push myself a little bit to be a little bit more outgoing than I normally am and a little bit more energetic than I would normally be. (Instructor J)*
>
> *It's a different level of energy. (Instructor B)*

Careful review of applications (occurrences) of the Energy code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators know you can't half ass good lead facilitation particularly in these types of intensive institute experiences.

I am still physically very energetic … I had more energy than the average person and again, I'm bragging, but people have marveled at that, and I can function highly on little sleep for those five days. (Instructor H)

I will say as a facilitator I pay more attention to … recognizing the length. I pay attention to my gas meter in the sense of … I gotta finish strong as I started and so if that means I've gotta … reserve some energy, go get some energy. I pay attention to that. (Instructor A)

The individuals that I've worked with have all been really people that give and take; and the we know you're doing a dance up there in front of the participants and with the facilitators and you want the dance to be seamless. You want to be able to connect with them and have them connect with you. And I love that, I love that, I love that interaction, I love the energy that comes from that and having you know such different people you know facilitate with. They bring such different skills. (Instructor K)

- Good leads give it their all. They give everything to the experience, go above and beyond; they believe their job is more than teaching or facilitating but it's really about hanging out and experiencing the institute through the eyes of the students.

  You've got to role model if there's a game night and you're doing a game at the end, you've got to be there. Because if you're about building community you've got to be there role modeling it. So it's definitely a different experience and a different energy level. (Instructor K)

  What their favorite facilitation is, I need to make sure I understand what their philosophy is. If they want me to be the nurturer or if they need me to be more energetic. (Instructor F)

  Here's your metaphor … the rollercoaster. Sometimes you have to create more energy in order to continue movement. Sometimes you have to create the speed via a hill in order to get through the loop that's coming. Sometimes you need to slow it down because too much energy going into this turn will fling them off the ride. I am, however, not concerned with … that came out a little harsh, but … a little bumping, a little bruising along the way. Metaphorically, not real. (Instructor H)

- Good lead facilitators often have an agenda. They are intentional because they want to help change students. Good leads want to guide students to a place where the lead's sense of idealized future becomes that of the students or students take the lead's sense and tailor it to meet their context. They intend to change students' perspectives and

there's a commitment to transforming the lives of students. Good leads view themselves as having the skills or the persuasive abilities to do this.

Feel the excitement, the emotion, I have about the topic, that it just allows them to kind of go there. (Instructor M)

I'm listening to and feeling the energy of the room and not just paying attention to what is … what my agenda is. Not just focused on I need to get this piece done in the next twenty minutes or the next forty-five minutes. (Instructor D)

- Good leads have fun with students. They are intentional about creating a light-hearted atmosphere that supports students' learning.

  I like to sing and dance, not like I'm going to like get up in front and be like OK everybody watch me sing, but beforehand if we have music going and just something to get the energy up. (Instructor J)

  We're not at a funeral (Laughter). I just (Laughter) and I've been to some funerals that have been really light at the beginning … but you set the energy early. I want the energy to be light … that they feel connected to the group … because that is going to set, not only the energy for the day but it really is for the rest of the time; because it's that first impressions thing. I hate that saying, but first impressions are first impressions for a reason. (Instructor A)

- Good lead facilitators develop an awareness of balance with their co-lead. They know that to ultimately be successful that it must be a shared space for both of them.

  I think is important when I'm co-teaching is paying attention to who we are and what our styles are and what our energies are, and again the impact on the room. (Instructor D)

  I'm always being very clear with my colleagues around … there is gender and then there is gender … there is the gender dynamics that are just there between male and female, but then there is age, and the intersection of size, that I show up in … which is alpha and dominating and so without even trying to be overbearing or take up more space than my co-lead, I can do that and I'm conscious of that and if my co-lead is not that kind of space commander, then I want to make sure that I am, again balancing my energy. Not that I am not who I am or not that I minimize myself, but I am balancing. (Instructor D)

Summary of code 20: Energy

Good lead facilitators know you can't half ass good lead facilitation particularly in these types of intensive institute experiences. Good leads give it their all. They give everything to the

experience, go above and beyond; they believe their job is more than teaching or facilitating but it's really about hanging out and experiencing the institute through the eyes of the students. Good lead facilitators often have an agenda. They are intentional because they want to help change students. Good leads want to guide students to a place where the lead's sense of idealized future becomes that of the students or students take the lead's sense and tailor it to meet their context. They intend to change students' perspectives and there's a commitment to transforming the lives of students. Good leads view themselves as having the skills or the persuasive abilities to do this. Good leads have fun with students. They are intentional about creating a light-hearted atmosphere that supports students' learning. Good lead facilitators develop an awareness of balance with their co-lead. They know that to ultimately be successful that it must be a shared space for both of them.

Code 21: Clarity & Effective Communication

The Clarity and Effective Communication code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it was also highlighted in institute programs by the lead facilitators themselves. This led to 16 applications (occurrences) of this code, ranked 23rd (tie) by number of mentions by lead facilitators and 9 leads identified its importance.

> *When have those homeruns been hit? It's when there's been the clarity of the communication. It's not muddy, it's not complicated, it's simple, yet passionate, in whatever is required at that point in time. But good communication is very, very important. (Instructor L)*

> *The multi-communication approach over an extended period of time; whether it's from the point that they registered for the program, or were being recruited into the program, to their days well beyond completion of the … experience. (Instructor L)*

Careful review of applications (occurrences) of the Clarity and Effective Communication code revealed the following descriptive statements along with defining participant quotes from

the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators have a plan and they take students where they want them to go but aren't always directive. They remind students of where they've been, what they've done and revisit the goals of the curriculum and the institute.

  Letting people know where they're headed. (Instructor A)

  I try to get the information out there the best I can so that they have an understanding of what it is and why we're talking about it. The why piece is probably more important than what you teach. They've got to know why you're talking about it in the first place. (Instructor G)

  Communicating … so that you're delivering things quickly in bursts of information. (Instructor N)

  It is incumbent for the co-lead to be a good communicator. It seems so trivial and so like, tell me something I don't know, but it's just like not everyone can be an NFL quarterback, right? Not everyone can play ball like Michael Jordan. I was thinking about a couple of our board members, who sometimes when we put them at the podium on stage, they are so focused on getting the words absolutely accurate to what was written in the script, as opposed to relax and just deliver them as though they were your own, well all of that is based upon an understanding of good communication. (Instructor L)

- Good leads help students and facilitators manage expectations in real time. They expect both to contribute and to be present (mentally and physically).

  I usually say something like, 'clearly, you see that I like to have fun, but I also know when it's time to work' and then I go into 'this is what my work face looks like' kind of thing. So there's no confusion of, 'oh, he's … wait, are we working now?' 'No, we're playing.' 'No, we're working' … you know? (Instructor H)

  Figure out how to communicate so that you can know when they need a break or when something is frustrating them or things like that. Not only learning how to read them but how to communicate that and how to communicate, be explicit with them about, this is a moment where you can step up for me and this is a moment where I can step up for you. (Instructor I)

  It's also important to define and institute for participants, and many students haven't, as least it seems to me, many students haven't participated in institute type learning.

They're more familiar with conference type things where it's a menu and you pick and choose … not this shared experience piece, and that becomes really important because most students come to it not having a clue. That becomes important and defining what's expected, just how are we going to operate and whatever those shared expectations are. (Instructor G)

- Good lead facilitators are transparent and honest in their communication. They echo back what they are seeing and hearing to the participants.

  They're going to hear what I think, and what I observe, and … it will come from a place of love but it will be not all roses. I don't shy away from telling you the hard stuff. (Instructor C)

  Really being that honest, completely transparent mirror for that individual, because then it's a growth experience. (Instructor M)

Summary of code 21: Clarity & Effective Communication

Good lead facilitators have a plan and they take students where they want them to go but aren't always directive. They remind students of where they've been, what they've done and revisit the goals of the curriculum and the institute. Good leads help students and facilitators manage expectations in real time. They expect both to contribute and to be present (mentally and physically). Good lead facilitators are transparent and honest in their communication. They echo back what they are seeing and hearing to the participants.

Summary of codes 15 – 21: What good teachers do when they teach

Seven of the 27 codes fall under this question of what good teachers do when they teach, and include: Student-Centered, Conducive Learning Environment, Personal Disclosure/Vulnerability, Passion/Enthusiasm, Humor, Energy, and Clarity and Effective Communication. Of these eight codes, four codes were identified by the meta empirical research about effective teaching in the classroom, two codes were identified by students in my early research project about student perceptions of good lead facilitations in institutes, and the lead facilitators in this study identified one code. In sum, this resulted in 507 applications

(occurrences) of code of the 1,328 total, or over 38% of all applications (occurrences) under the research question of what good teachers do when they teach.

Research Question #5: How do good teachers treat students? (Codes 22 – 26)

Five of the 27 codes fall under the research question of how good teachers treat students, and include: Care and Compassion, Fair/Timely Feedback, Availability to Students, Listening, and Approachability. The codes are ordered and prioritized (highest to lowest) based on their frequency of application (occurrence) from the 15 transcribed interviews with good lead facilitators from the four programs in this study.

Code 22: Care & Compassion

The Care and Compassion code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it was also highlighted in institute programs by the lead facilitators themselves. This led to 104 applications (occurrences) of this code, ranked 4th by number of mentions by lead facilitators and all 15 leads identified its importance.

It's about the group and I care a lot about the group. (Instructor A)

It's important from a lead perspective to watch and to care. (Instructor M)

The credibility is established because they know I care. (Instructor H)

I want to build them up. (Instructor O)

When you show up you have to care. (Instructor E)

Careful review of applications (occurrences) of the Care and Compassion code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators create a culture of care and invite students to care about others and themselves. They recognize that by caring for one another the environment is ripe for conversations about what matters most to people.

  I begin with a general care for the individual's learning, and I have to see it as that and not see it as like a task or a job. (Instructor M)

  I was trying to get the concept of understanding of empathy and trying to help students understand … what it's like to live in someone else's shoes. It's really hard to have and appreciation or an understanding, if you're poor, what it's like to be rich and vice versa; or if you're of one faith, someone else's, and how they practice; or sexual orientation or a divorced family versus a traditional, right? Or you've had a parent that's died or you just come from a Beaver Cleaver household. You know, all the nuances. (Instructor L)

  We have to pay such attention to how are we marginalizing students because of how they're acting out. It can be the exact same behavior that another student's wrestling with but because they act out in ways that are cute, we pull them in and I think that as a lead, that's one of our number one rules is to watch for the individuals and how are we pulling them in? How are we pulling them in? (Instructor C)

  Part of my goal is how as a lead can I create that environment where they matter and the big group and than foster that space, I guess for lack of a better term, for them to matter individually to one another … the first piece of it for me is you have to care, right? Some of it is showing up in a place where I care about how others are experiencing me, are experiencing the environment, a piece of that for me also has begun to advocate. (Instructor E)

- Good leads recognize that each student has their own story and they respect that story and aim to make the curriculum personal for them when able. They are empathic and demonstrate care and concern even when it means doing so in front of an entire room.

  I want them to believe that they won't deal with anything that others haven't dealt with. So in one respect I want them to feel special and unique, then in another respect I don't want them to feel special/unique at all. I want that healthy balance of humility, but also empowerment and confidence. (Instructor L)

  I want an appetite for learning, an appetite for truth, a disposition for comfort with discomfort and willingness to move through and engage whatever scares them, an appetite for adventure, an appetite for positive change for humanity. (Instructor D)

I don't want them to question concern or care. I want them to understand that everything comes from a position of care and that discomfort is about their learning, not about their discomfort, if you will. (Instructor H)

I don't want to be the teacher or facilitator that ever shuts that down or has someone thinking, 'Oh my God I am not smart enough to be here.' I hate that because we are brilliant beings and the people who don't get to show up as brilliant have essentially gotten it beat out of them, or shut out of them, or shamed out of them. I am not so worried about how they think and I think that is what I hear when I hear intellect. I am worried that they know they can. (Instructor A)

- Good lead facilitators help students have a healthy sense of what they have felt was impossible and help them realize they can accomplish things. They focus on knowing students' shared and distinctive characteristics and they approach students as genuinely interested though maybe not knowing how to be better; they recognize that they need to affirm students.

  It starts with that realization of who I am and the power I hold to make a difference in every interaction I have, every conversation I have. (Instructor E)

  At the end of the day every single one of them matter. They have the ability to do good and big things. (Instructor L)

  I would hope that they would believe that they have the power to make change. That's what we want in our student leaders on college campuses that they have the power to make change in their communities. Positive change. That they're able to be champions for individuals that need someone to support them nurture them. (Instructor K)

  I want to persuade students to believe that everyone that they come in contact with has something to teach them, and that and I want them to believe that the world, their world, can be better because of their hand in how it runs, or how it operates, or how it happens. Those are the two most important lessons that a student can learn. (Instructor I)

- Good leads understand the value of Maslow's hierarchy of needs. They recognize it's difficult to take students on a journey with them if basic needs aren't met.

  I always try to think about what basic needs do I have for space? What basic needs are my participants going to have for food, getting their caffeine fix, getting their sugar fix, sleep, some private space. Are they being put four to a room and not sleeping at night? Or are they in a sleeping dorm and I think all those things play into how well people learn in an institute, and how well people come to the table every morning prepared. The

smart logistical person will have really vetted that all out well prior to getting there but you never know what you're going to get. I think those are questions that you need to ask. (Instructor G)

You have to be prepared for surprises and you have to you have to realize that everyone has different expectations. Even if you were in a room of a hundred people, you'd have two-hundred expectations or three-hundred ideas of what's happening next. You have to be able to balance everyone's needs. (Instructor F)

To attend to each other regularly in whatever ways the person needs to be attended to. (Instructor H)

- Good lead facilitators know how to reassure and make content contextualized for the participants. They make sense of the progression from beginning to end and understand the distinct needs of students at each point in time.

  Encouraging them to do whatever it is they're going to do as a result of their learning. Being realistic about that, that it's not always easy. Some of those folks might be facing giant uphill battles. The biggest thing is encouragement and validation. (Instructor N)

  I do a lot of affirmation with students. When they talk about something that they've either been successful with or, that they've tried and met with some limited success, I try to affirm that they're doing things and I try to be OK, that's great, what's next? Those become kind of my primary teaching methods. (Instructor G)

  A big piece of encouraging students to learn is affirming them in the process. (Instructor E)

- Good leads see students as real people. They understand that we all want to feel respected, appreciated, and treasured.

  A lot of that is being personal, being human, and being compassionate, empathy, with the learners. (Instructor L)

  I have to have a general care for their understanding and their development and growth. I start there, when I teach … of reminding myself these are human beings. They may not want to be here. That's fine. They may not like me. They may … disagree with something I have to say, but if on the outset I have a general care for their growth and their development and their willingness to teach me. (Instructor M)

  I believe I value human beings well ... I don't know that I want to do anything else better in my life. If that is why I show up as a good teacher, lucky me, because that is pretty easy. (Instructor A)

- Good lead facilitators value their relationship with students and steward it by supporting and encouraging them whenever possible.

  Celebrate the relationships and the time that they spent together. (Instructor J)

  They hear how I've valued what this opportunity has been about; they know that it has made a difference to me as … they've made a difference to me as I hope that I have to them. (Instructor D)

  It's an opportunity for me to celebrate them for their accomplishments and for the things they've taught me in that week that we've had together. (Instructor I)

- Good leads authentically get to know students, what they care about, and what moves them. They are often immersed with students and have a desire to learn their passions.

  Genuinely trying to get to know them, not just doing it because I think I need to, but wanting to know who's here and what brought you here. (Instructor M)

  What you care about, what you think about, what you wonder about, matters. Share it. Get it out there. (Instructor C)

  Get in there and really know what all these people are doing and know what's going on in their lives, and in their schools, and in their programs and whatever they're doing. (Instructor J)

- Good lead facilitators invest in students as people. They champion students and serve as a cheerleader for their success.

  Whether the facilitator acknowledges and allows people to feel like their opinion matters. (Instructor M)

  You've got to be invested in them and they need to realize that at the particular moment that you're there with them. (Instructor G)

  My job is to help make that person look like a rock star. My job is to help make people understand that if you can't talk to one of us you can talk to the other and every facilitator is your facilitator. My job is to do whatever I can to make that person shine so that our program is successful. (Instructor F)

- Good leads give students chances to redeem themselves if they've made a mistake. They are no stranger to failure themselves and believe that everyone deserves another chance to be their best selves.

  The failure piece … you've got to be willing to support … and to say if you fail it's OK, that we're here to help support you; we've got a safety net. (Instructor G)

  There's a long-term approach, I need you to know that this moment matters and also the beauty there's going to be another moment right after it. So if this moment didn't go like you wanted it to go, it's OK because you're going to have another one and so that persistence and that long-term and if that moment fails, you got another one coming. (Instructor C)

Summary of code 22: Care & Compassion

Good lead facilitators create a culture of care and invite students to care about others and themselves. They recognize that by caring for one another the environment is ripe for conversations about what matters most to people. Good leads recognize that each student has their own story and they respect that story and aim to make the curriculum personal for them when able. They are empathic and demonstrate care and concern even when it means doing so in front of an entire room. Good lead facilitators help students have a healthy sense of what they have felt was impossible and help them realize they can accomplish things. They focus on knowing students' shared and distinctive characteristics and they approach students as genuinely interested though maybe not knowing how to be better; they recognize that they need to affirm students. Good leads understand the value of Maslow's hierarchy of needs. They recognize it's difficult to take students on a journey with them if basic needs aren't met. Good lead facilitators know how to reassure and make content contextualized for the participants. They make sense of the progression from beginning to end and understand the distinct needs of students at each point in time. Good leads see students as real people. They understand that we all want to feel respected, appreciated, and treasured. Good lead facilitators value their relationship with

students and steward it by supporting and encouraging them whenever possible. Good leads authentically get to know students, what they care about, and what moves them. They are often immersed with students and have a desire to learn their passions. Good lead facilitators invest in students as people. They champion students and serve as a cheerleader for their success. Good leads give students chances to redeem themselves if they've made a mistake. They are no stranger to failure themselves and believe that everyone deserves another chance to be their best selves.

Code 23: Fair/Timely Feedback

The Fair/Timely Feedback code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it was also highlighted in institute programs by the lead facilitators themselves. This led to 53 applications (occurrences) of this code, ranked 10th by number of mentions by lead facilitators and all 15 leads identified its importance.

Careful review of applications (occurrences) of the Fair/Timely Feedback code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators' antennas are always up and they seek out indicators of whether students are learning with them. They constantly check in.

  Regular check ins throughout the experience are really important. (Instructor N)

  I use the term, 'I need to take your temperature. I need to know where you're at right now.' (Instructor H)

  You need to do a gut check at some point. What's working and what's not working? We're … try to get a pulse of, through working with your clusters and working with your co-lead, where do you think the group is right now? Have we lost them completely? Have we captured them completely? Or on that continuum, where are they? Do we need to go back and un-do something? (Instructor B)

Check in on those expectations that have been set at the beginning, see how we're doing with them see if people are, holding up their end of the bargain, and see if anything needs to be changed along the way. (Instructor I)

- Good leads don't shy away from tough conversations. They know that providing critical evaluation helps students grow in the long run.

  They'll get critical feedback. That they'll get … for me, my truth. (Instructor C)

  You have to challenge when appropriate and confront when appropriate. (Instructor G)

  If a negative behavior happens you have to immediately address it and it's going to be a tough lesson to learn; but if it happens during processing then you have to address it then. If it's something you can pull an individual aside for then that's great. That's always ideal but you don't always have that luxury. Once you've addressed that I always feel an obligation to then, check in with that person again and again, and then give them an opportunity to, I don't want to say redeem themselves, but respond differently, put them in a situation again where they can show others that they've changed if it's been in a public way. (Instructor I)

  I won't be afraid to pull that person aside and have a discussion and challenge them on that, but I also won't be afraid to pull someone aside and say … I really appreciated you sharing and that was awesome. (Instructor M)

- Good lead facilitators use their team to evaluate where the group is. They recognize the value of objective feedback from small group facilitators; it provides additional insights critical to assessing if everyone is with them.

  But as we're getting ready I'm talking to the small group facilitators. I like to check in with them and learn what I can from them. (Instructor I)

  In an institute context your relying largely on those small group facilitators to be able to provide that feedback of what it's like when their actually eye ball to eye ball in a conversation. (Instructor E)

  It is the evaluation feedback, check-in, and it's separate from the process. It's an insertion of 'this is all created. How have we created it? Let's truly … be able to get to the balcony and check it out.' Giving that feedback back. Making changes based on it. (Instructor C)

- Good leads capture moments. They're opportunists. They know when their students are articulating what it is they want them to learn and can identify those students who aren't there yet. Good leads want students to own their experience and understand their role in providing insight but not directing.

  How you respond enables them later on in the experience to go there again and to take a risk again and maybe fail again. (Instructor M)

  They're in the moment with you and you will remember that conversation and you will follow up. (Instructor F)

  If the opportunity is given to fail, there's that intentionality of that feedback and that re-bolstering and saying, 'OK, let's try this again.' (Instructor H)

  I can pretty easily translate that to how a student needs to hear that information. I pick up on people fairly quickly and I try and adapt. (Instructor I)

- Good lead facilitators also apply good facilitation tactics, like feedback, in all their teaching environments.

  I've had experiences with students where they have reciprocated that back to me where maybe at first they didn't, and once I showed them I really was genuine and cared about their questions and concerns, their situation, the next time I interacted with that student and I needed them to be the listener, I think I had a little more credibility. (Instructor M)

  I'm quick to jump on that and talk about how that translates back. (Instructor K)

  Giving feedback to one another and giving it honestly. That's the hardest stuff in the world. (Instructor L)

- Good leads support and encourage students. While it comes from a caring place, they also know it's strategic.

  It's good to just show people how far we've come. It's good to connect with the relationships that have been built. It's good to remind people that we're not done. (Instructor F)

  Pre and post sessions giving praise to students for their commitment and their sharing and their engagement and then also challenging others. (Instructor M)

That I design in something that acknowledges the work that we've done together. That's important. (Instructor A)

Summary of code 23: Fair/Timely Feedback

Good lead facilitators' antennas are always up and they seek out indicators of whether students are learning with them. They constantly check in. Good leads don't shy away from tough conversations. They know that providing critical evaluation helps students grow in the long run. Good lead facilitators use their team to evaluate where the group is. They recognize the value of objective feedback from small group facilitators; it provides additional insights critical to assessing if everyone is with them. Good leads capture moments. They're opportunists. They know when their students are articulating what it is they want them to learn and can identify those students who aren't there yet. Good leads want students to own their experience and understand their role in providing insight but not directing. Good lead facilitators also apply good facilitation tactics, like feedback, in all their teaching environments. Good leads support and encourage students. While it comes from a caring place, they also know it's strategic.

Code 24: Availability to Students

The Availability to Students code can be found as a key focus in the meta empirical research about effective teaching in the classroom. In addition, it was also highlighted in institute programs by the lead facilitators themselves. This led to 40 applications (occurrences) of this code, ranked 13th by number of mentions by lead facilitators and 14 leads identified its importance.

Careful review of applications (occurrences) of the Availability to Students code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators meet students where they are. They understand that exploring the intellect of an issue is only one part. Good leads make time to address the affective side of things by helping students understand issues, apply them, analyze them and make sense of it all in terms of their individual context and their feelings in and out of the sessions.

  Some of my best conversations at UIFI happen during free time and it's not even asking for questions that exist and occur in the curriculum. (Instructor F)

  Continue to have those conversations over … the walk to the cafeteria or on their way to the next session or something like that. Sometimes it's not intentional it just happens. (Instructor J)

  The other piece of caring also comes back to engaging the individual participants. Sitting down at a meal or before a session and say like, well tell me a little about yourself and than genuinely being interested in what they have to say. (Instructor E)

- Good leads seize opportunities to connect with their students inside and outside of the institute. They recognize that they play different roles at different times throughout the institute but their commitment goes well beyond the duration of the program. Good leads know that the experience is finite, possibly sooner than needed for some students. They recognize the institute itself has been set up as the catalyst for change but that it's one step in helping transform students' lives.

  You're not going home with them, and there is definitely a, a distance role of coach or of mentor or of resource or whatever that has been established for each person, but starting to extricate yourself so that the knowledge is more important than the teacher when they walk out the door is very important. (Instructor N)

  It's equally as important for participants to know that you're still available to them. (Instructor G)

  And for many of our really great leaders and great motivators and great individuals it's a year later when they realize that they've tried everything they can and the future is not going to be what they wanted. That's why it's so important for these facilitators to keep connections with the students because, it's one thing to wave goodbye to the bus and send

an email, but it's another to be on the other end of a phone call, and I am every year; letting people know it's OK. (Instructor F)

- Good lead facilitators know that showing up means you have to be accessible to have meaningful conversations when students are ready to have them. They realize that doesn't always happen during facilitation or structured times of the curriculum.

  If it's staying up late and having fun with the participants, you're also earning that credibility and the political capital that allows you to push a little further than you may otherwise if you'd just gone to bed the night before. (Instructor L)

  I practice the first up, last down. So my interactions with people in the morning are just as meaningful as those as we walk to bed. (Instructor H)

  To be a great facilitator and to be nurturing and to be supportive, you have to, I have to be open for the conversations and opportunities that exist long after the book is closed. (Instructor F)

  Spending time with them in the evening during kind of the social time, having one-on-one conversations and letting them know … hey, I can sit and play this game with you or we can go have a quick chat, and I want you to tell me more about what's going on. (Instructor M)

- Good leads make it about the lessons not about them. They are always on. Good lead facilitators use their preparedness for the curriculum and when they're not enacting the curriculum, they're fully investing in the students and fellow facilitators.

  How am I fully present? (Instructor C)

  I need to be there and be fully invested. (Instructor G)

  And to those that do fully invest, their promise is realized. That promise is realized by the attention that they get. (Instructor H)

  I'm … willing to spend a lot of time helping think about how to do that. (Instructor N)

- Good lead facilitators exemplify commitment. They know there is no substitute for it.

  The conscious choice to be there, the conscious choice to be present, to both physically and mentally show up with love and commitment, and go the extra mile. (Instructor C)

If you're going to be there you need be there. You need to be focused on it and understand that you might have to sacrifice some things in your personal life or your professional life for a week; but that in the end you're going to get so much more out of it. That it's worth it, at least to me. (Instructor J)

- Good leads recognize that part of preparation is setting the right tone at the beginning. They know that handling and managing their own affairs before things begin is important.

  I'm definitely shaking hands I'm chatting with them I'm getting to know them in the beginning. (Instructor O)

  What's going on for me? What do I need to manage so that I can put it away? What do I need to know is going on so I put closure to it or I accept it's not going to have closure and so I just let it go. (Instructor C)

  Participants are coming into this session or we're walking in and I'm chatting with them about whatever I can. (Instructor O)

Summary of code 24: Availability to Students

Good lead facilitators meet students where they are. They understand that exploring the intellect of an issue is only one part. Good leads make time to address the affective side of things by helping students understand issues, apply them, analyze them and make sense of it all in terms of their individual context and their feelings in and out of the sessions. Good leads seize opportunities to connect with their students inside and outside of the institute. They recognize that they play different roles at different times throughout the institute but their commitment goes well beyond the duration of the program. Good leads know that the experience is finite, possibly sooner than needed for some students. They recognize the institute itself has been set up as the catalyst for change but that it's one step in helping transform students' lives. Good lead facilitators know that showing up means you have to be accessible to have meaningful conversations when students are ready to have them. They realize that doesn't always happen during facilitation or structured times of the curriculum. Good leads make it about the lessons

not about them. They are always on. Good lead facilitators use their preparedness for the curriculum and when they're not enacting the curriculum, they're fully investing in the students and fellow facilitators. Good lead facilitators exemplify commitment. They know there is no substitute for it. Good leads recognize that part of preparation is setting the right tone at the beginning. They know that handling and managing their own affairs before things begin is important.

Code 25: Listening

The Listening code was first identified by students in my early research project about student perceptions of good lead facilitations in institutes but was also reinforced and supported by lead facilitators themselves. This led to 33 applications (occurrences) of this code, ranked 15th by number of mentions by lead facilitators and 12 leads identified its importance.

I listen. (Instructor A)

I try to model … by listening. (Instructor M)

I think listening is incredibly important. (Instructor B)

It's around really listening. (Instructor C)

I listen a lot … I have this weird ability to listen. (Instructor H)

Careful review of applications (occurrences) of the Listening code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators are engaged in all aspects of the institute; they listen at all times, they are engaged, and they are participants. They came to educate, but they must attend to basic human needs.

  I listen but that listening is guided by valuing people … I would name being in the present moment. That is very connected to listening. (Instructor A)

We tend to see students that are quick to judge and quick not to listen. Those are skills that I want them to think about is our listening and acceptance of others and acceptance of others viewpoints, and being OK with hearing other viewpoints and not being … understanding that there can be different points of view and that's OK and that it doesn't always have to lead to conflict, war, I hate you, it can lead to we can coexist. (Instructor G)

The biggest thing that comes to mind for me is listening, and if I can show a student or show a group of students that I'm really listening to them when they share a concept or they share a frustration, that if in those tough moments I can show that I really genuinely do care about their struggle or their concern, and am not just listening to them while preparing my reply. (Instructor M)

- Good leads move beyond the idea of basic understanding of students (name, demographics) and they share knowledge and foster an environment in which everyone recognizes themselves as learners and educators. They become invested in knowing the individual stories of participants and engaging them in ways that help students contextualize their knowledge.

  That doesn't mean just talking, that also means listening, prompting someone else, 'I don't know what do you think? What do you think? Does anybody else have a story like this? How could we take this on?' The listening and communication instruction is critical. You'd think that'd be the most obvious. (Instructor L)

  Listen to what they've already gone through or what their life experience is and show some comparisons and ask them 'what if?' That's how you challenge. (Instructor F)

  Good facilitators have to be good learners … and good listeners. Honestly the key to helping students get to a desired outcome or to a desired place at the end of a specific session is really to listen to what they are telling you in the first place, and then to prompt them or to follow up with a question that's based on what they are. If you're not listening they will immediately know, and that's going to be an immediate turn off to the learning process. I think facilitators have to not only be able to think on their feet but we also have to be able to listen and really get quickly at the core of what somebody's saying. (Instructor I)

- Good lead facilitators know when to be quiet. They know when to engage non-active participants through non-verbals and positioning.

I can only do my listening, this kind of listening that I'm talking about, if I'm present … if I'm physically present and moving about. I don't sit in a corner. I continuously move, especially during downtimes. Or I strategically stand at a certain place during meals so that everyone has to walk by me and we can interact as you're walking by. I usually at meals, or during downtime, sit in the middle of a big room so that I can hear what's going on. I sometimes get distracted from my own activity because I'm listening to what's happening. (Instructor H)

Listen. Listen, listen, listen and seek to understand. As I share … listen, seek to understand, and engage. I'm listening to eyes and listening to body language and paying attention to all of that stuff and I'm listening to and feeling the energy of the room. (Instructor D)

Make eye contact with them … make sure that I'm listening, they know that I'm listening. (Instructor O)

- Good leads often don't have prepared answers to students' questions. Part of really being present is really listening to what students are saying and then responding. They know that previously prepared answers show up as canned.

  It's the idea about good listening … that I don't already have my answer because I don't know what it's going to say. It's totally being the best listener possible so I know where the group is, where the individual is, so that I am relevant, not noble, right? Thank you, Al Sharpton. My goal is to be relevant not noble, and that means that I have to listen all the time. (Instructor C)

  If I'm talking to the group or we're having conversation and I don't understand something and they're not at the point I where I really want them to be, I'll bring that in. That they understand, this is real, this isn't just a script that we're reading, we're all involved in this and we are all part of understanding and getting to the next day. (Instructor F)

  While answering questions … I'm a bigger fan of like restating what they said to make sure that I'm hearing it right. (Instructor O)

Summary of code 25: Listening

Good lead facilitators are engaged in all aspects of the institute; they listen at all times, they are engaged, and they are participants. They came to educate, but they must attend to basic human needs. Good leads move beyond the idea of basic understanding of students (name, demographics) and they share knowledge and foster an environment in which everyone

recognizes themselves as learners and educators. They become invested in knowing the individual stories of participants and engaging them in ways that help students contextualize their knowledge. Good lead facilitators know when to be quiet. They know when to engage non-active participants through non-verbals and positioning. Good leads often don't have prepared answers to students' questions. Part of really being present is really listening to what students are saying and then responding. They know that previously prepared answers show up as canned.

Code 26: Approachability

The Approachability code was first identified by students in my early research project about student perceptions of good lead facilitations in institutes but was also reinforced and supported by lead facilitators themselves. This led to 16 applications (occurrences) of this code, ranked 23rd (tie) by number of mentions by lead facilitators and 9 leads identified its importance.

I've shown that I am human. (Instructor M)

I want to be seen as a lead facilitator, but I also want to be approachable. (Instructor F)

Somebody that they can talk to and approach. (Instructor I)

I want to be welcoming and I want to be fun and invite students in. (Instructor J)

Careful review of applications (occurrences) of the Approachability code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators know students as individuals. They make it about relationships and not making assumptions about how those relationships are going to go.

  It's more important to approach others in order to, to sort of establish myself as approachable. To let people know that we're glad they're there, and to you know invite them to, to join us doing whatever. (Instructor N)

I would describe my relationship with students as credible. They are personal, without being too buddy buddy, there's still a respect factor there. There's a certain separation, unspoken. I think that the relationship would be fun and enjoyable, friendly, approachable. Yeah. Genuine. (Instructor L)

I'm not a lead that quickly develops deep, heart-to-heart every night kind of tears and the pillow relationships with students, but I think finding common ground with them, finding ways to be approachable. I'm generally interested in who they are and what they have going on and why they, why they showed up that week and what they think of it, and that brings us to a good place. (Instructor N)

- Good leads know that approachability plays a primary role in creating an environment where students can talk with them openly.

  I also like the soft launch approach. I like to be in the room setting up and talking to whoever's in there and getting their help. (Instructor F)

  I feel like they need to trust me and feel like they can come and talk to me, if there's an issue and if they need too. (Instructor J)

  That just my demeanor is nonthreatening and fairly approachable … at least I've been told that people find that they can come up after interacting with me a little bit and feel like they can talk to me about a lot of things. (Instructor I)

- Good lead facilitators have a sense of selflessness and focus that allows them to leave others behind who are not there with them – partners, work, etc. – it all takes a backseat to their need to be a good lead and to be available and present during the program.

  I feel like students have come to me those relationships they've come and asked question or when they've had problems they've feel a rapport with me that they can come in and talk with me about it. I enjoy that. I enjoy that connection with people because that's what I had as an undergraduate and as a graduate student. (Instructor K)

  At the beginning it's like you're at camp, you're like the head camp counselor and that's how it feels, that you have to go through the rules and you're kind of funny, you're approachable, you can be very disarming, a lot of these students don't know a soul there; but you're the one up on stage so they kind of intrinsically know they can at least approach you. (Instructor O)

Summary of code 26: Approachability

Good lead facilitators know students as individuals. They make it about relationships and not making assumptions about how those relationships are going to go. Good leads know that approachability plays a primary role in creating an environment where students can talk with them openly. Good lead facilitators have a sense of selflessness and focus that allows them to leave others behind who are not there with them – partners, work, etc. – it all takes a backseat to their need to be a good lead and to be available and present during the program.

Summary of codes 22 – 26: How good teachers treat students

Five of the 27 codes fall under this question of how good teachers treat students, and include: Care and Compassion, Fair/Timely Feedback, Availability to Students, Listening, and Approachability. Of these five codes, three codes were identified by the meta empirical research about effective teaching in the classroom and two codes were identified by students in my early research project about student perceptions of good lead facilitations in institutes. In sum, this resulted in 246 applications (occurrences) of code of the 1,328 total, or over 18% of all applications (occurrences) under the research question of how good teachers treat students.

Research Question #6: How do good teachers check their progress and evaluate their efforts? (Code 27)

One of the 27 codes, Reflection, falls under the research question of how good teachers check their progress and evaluate their efforts. The code is included based on their frequency of application (occurrence) from the 15 transcribed interviews with good lead facilitators from the four programs in this study.

Code 27: Reflection

The Reflection code can be found as a key focus in institute programs by the lead facilitators themselves in this study. This led to 43 applications (occurrences) of this code, ranked 11th by number of mentions by lead facilitators and 12 leads identified its importance.

Careful review of applications (occurrences) of the Reflection code revealed the following descriptive statements along with defining participant quotes from the interviews that showcase, highlight, and provide context, depth, and breadth for the statement:

- Good lead facilitators understand that part of learning is taking time to reflect on what's happened. They know it is key to capture those thoughts, feelings, and musings to help students take their leadership to the next level.

  There's a time and place for varying types of feedback, and it can be in person on the spot, it can be later after some reflection, it can be in writing, it could be after the programs done. (Instructor L)

  That's also a perfect opportunity for reflection pieces … sometimes in institutes that whole reflection piece where you ask them to reflect in a workbook or whatever becomes an excuse for play time too. You've got to be careful about that and think about how you create intentional reflection that might not just be writing in a workbook, it might a partner walk, instead of writing it might be drawing. (Instructor G)

  If they've shared, then there's an element of self-awareness that cannot be avoided and I think that that's beneficial to the individual for their leadership development but also their personal growth. (Instructor H)

  Inviting them to spend some more time thinking and feeling about it and others … it's just simply not answering or coming to a conclusion around everything. (Instructor D)

- Good leads have a natural curiosity about how to be better and they seek feedback in order to elevate their game. They are clear about the intentions of the program – they believe that intentions should be backed with data and they seek to understand how students perceive the outcomes have been accomplished.

  Modeling personal self-reflection. (Instructor D)

How do you personally feel like you showed up at this? And the evaluations are the evaluations. I mean, that's all they are. But to actually ask somebody to reflect on that, would be I think really cool. Really good. (Instructor B)

Getting a read on where they are in the learning process, a majority of that for me comes from small group facilitators, reflecting on what I'm hearing in the large group setting, back to my crazy bullet points about where I want the students to be in the learning continuum, am I hearing those things, are they hitting those bullet points? (Instructor N)

- Good lead facilitators have aspirations and wishes for students. They want them to succeed but also want them to know why they succeeded, or if they didn't, why they didn't.

  An appetite for reflection because I don't think that, I'm generalizing, but I don't think that's something that exists in our audience, in the institute audience right now. I think it's an important thing but it's also an important skill. Planting the seed of doing that or instilling a desire to do that, and somehow helping them know that there's not a one size fits all reflection model either, but it goes back to questioning too of helping them understand that they just need to think sometimes or talk out sometimes or process things, I think that would be fantastic. (Instructor N)

  I try and engage through individual reflection and try and get them to understand and reflect personally. (Instructor K)

  I would want them to reflect back and say that they knew me as a result of our interactions. (Instructor H)

- Good leads reconsider their previous experiences, use them to inform new ones but develop different approaches because they must. They also have had experiences that inform their approach.

  One way is the student evaluations of the sessions. I can remember looking at those and feeling responsible, positive or negative, or middle of the road, whatever, that my hand, in whichever sessions I was participating in, or leading, had some influence on the manner in which the students evaluated those sessions. I can remember reflecting on those, when I would lead those sessions in future years. Thus, do that again, or don't do that again, or pause and think. How is the best way to deliver this content, compared to your prior experience? (Instructor L)

  I've spent a great deal of time doing personal reflection and I will tell you that I've kept somewhere, I've got them in boxes somewhere, my books for everything that I've facilitated, because I have gone back through them and looked over the curriculum and

said 'OK not sure that went the direction I wanted it to go.' 'This was better than I thought.' 'Yeah I still don't understand why this piece of curriculum is in there if I do it again I wouldn't do that piece I'd replace it with this.' Having some of that self-reflection of your own is important too. (Instructor G)

I always want to be a better facilitator, and I want to be a better advisor, and I wanna be a better CEO. You've been asking questions that are thought provoking for me, and … I'm gonna think about how I can be better, how I can be more deliberate in what I do. (Instructor F)

- Good lead facilitators recognize that we often are talking about big picture and big life issues. They know that grappling with these things takes time.

  There needs to be an exhale and a real reflection and calm, and at the end of the day; I don't care if it's corporate world, the education world, the nonprofit world, the medicine world, at the end of the day all of this, is about life. (Instructor L)

  That reflection piece is so critical, and why that's so important because just … they can't go 'to the next level' kind of in their … on their path, without having those lows, and failing. You've got to create ways to process that out, and make meaning of it, and go from there. (Instructor B)

  It's an opportunity on a really grand scale for some self-reflection and some self-awareness about individual principles and individual values and who are you and who are you going to be, and I don't think those questions are too big for them to ask. Maybe to answer, but I don't think they're too big for them to ask. I think that that institute gives them a great context to do it and hopefully a safe place to do it. (Instructor N)

Summary of code 27: Reflection

Good lead facilitators understand that part of learning is taking time to reflect on what's happened. They know it is key to capture those thoughts, feelings, and musings to help students take their leadership to the next level. Good leads have a natural curiosity about how to be better and they seek feedback in order to elevate their game. They are clear about the intentions of the program – they believe that intentions should be backed with data and they seek to understand how students perceive the outcomes have been accomplished. Good lead facilitators have aspirations and wishes for students. They want them to succeed but also want them to know why they succeeded, or if they didn't, why they didn't. Good leads reconsider their previous

experiences, use them to inform new ones but develop different approaches because they must. They also have had experiences that inform their approach. Good lead facilitators recognize that we often are talking about big picture and big life issues. They know that grappling with these things takes time.

Summary of code 27: How good teachers check their progress and evaluate their efforts

One of the 27 codes, Reflection, falls under this question of how good teachers check their progress and evaluate their efforts. The lead facilitators in this study identified this code. In sum, this resulted in 43 applications (occurrences) of code of the 1,328 total, or over 3% of all applications (occurrences) under the research question of how good teachers check their progress and evaluate their efforts.

Identified metaphors for teaching

Good lead facilitators were asked, "Are there any good metaphors for your approach to teaching?" This interview question and idea, while not one of the original research questions, was taken directly from Ken Bain's research and book *What The Best College Teachers Do* (Bain, 2004b) and is listed in Appendix D. Of the 15 good lead facilitators in this study, they shared 20 different metaphors. By far, the most commonly mentioned metaphor referred to their teaching as "a journey." This unprompted metaphor was named by two-thirds or 10 different lead facilitators. Their descriptions of this journey are described in greater detail below with quotes from their transcribed interviews to provide greater context.

Top metaphor: the journey

Good lead facilitators recognize that the experience is about others but that they're leading the journey to some extent, at least at the beginning. They know it's about self-

awareness, exploration, commitment, but not about them. Good leads understand they are on their own journey, just like students. They share what they've learned along the way and support students on theirs. Good lead facilitators integrate and refer to taking students on a journey in their own teaching and facilitation. Good leads choose to join students on this journey of learning. They provide good company for students on their journey to their "new place" from where they begin to where they end. Good lead facilitators acknowledge that it's critical to make sure you keep students engaged in this journey of learning. They recognize the importance of involving and retaining everyone with you. Good leads know that how we progress on the journey of learning matters. They understand that how we get there is just as important and where we go. Good leads review where we've been along the journey. They realize that reflecting on how we got there is just as important as why. Good leads know this helps students break down the journey and process of learning so that it can be repeated again. Good lead facilitators know they cannot be this journey alone. And, at times, if others are not on this journey with them, it can be difficult.

To showcase the journey, the following descriptions are provided from the transcribed interviews to provide more clarity and context to this metaphor:

> *How is this going to impact your family? How is this going to affect your relationships? If you are truly embarking on this kind of self-knowledge journey for the rest of your life, people are going to go with you. (Instructor B)*

> *I want them to be taken on a journey. I want them to realize that they have an even bigger potential than they thought. I want them to be challenged. I want them to be nurtured because that's who I am; if they're open to it (Laughter). I really want them to see that there's more to what they can do than they realize. (Instructor F)*

> *We are all on our individual life journey of learning about ourselves and the world and so it is rare that we take quantum leaps … that we can go somewhere else that somebody thinks we should go. We might get there but we get there in our own path and you might be able to try something else on for a while, but we're probably going to eventually get there by doing our own steps. It's how do I honor what your steps are versus what I think*

your steps should be. It's a conversation that we can come to the path of what that looks like. (Instructor C)

Probably by really sharing my own journey around coming to or being in process around all of that myself … and how, in fact, those dispositions and those big questions have positioned me in the world to live a very exciting, fulfilled, challenging, ever-expanding life. It's sharing myself and examples of others who are navigating or have navigated those kinds of questions and come to answers so that they see the value-add in being … having that disposition and/or asking those questions. (Instructor D)

When there are those epiphanies I'm quick to jump on that and talk about how that translates back to our own lives, our own work, our own personal experiences, and our own journeys. I'm on my own journey and it took me a long time in my career to realize that I wasn't in competition with anybody else. (Instructor K)

Teaching is about taking the principles, the material, the curriculum that you want the students or the audience to learn, and figuring out the best way to help them get to that learning journey. (Instructor I)

I'm going to be in with you through this journey, I think about it day by day. (Instructor A)

I think back to being in college and the people who were either my advisor or who were leading institutes and my perception was always that they had it completely together. For some college students that just like rocks their world, you know that, what do you mean you don't have every answer? We're all on this journey together. A piece of that that I often will explain to students, it's this idea of, we're all on the road but were in different places but we have to all keep moving and we all just need to keep moving in the right direction and to be moving and so it's OK if you don't agree with me on everything, I probably don't agree with you on everything but are we all trying to understand more? (Instructor E)

I will often kind of use the analogy of 'OK, let's review our journey. We started here. We stopped here. We played here and we've gotten to here. So I send you away from here with this knowledge. What you do with it is entirely up to you and it's not about me. It's about your integrity and your willingness to either do what you need to do … whether that's lead, follow, or get out of the way.' (Instructor H)

If you've got a small group facilitator who isn't with you on the journey, you've got probably more problems than you do with a student who is presenting some challenges … I've been in situations where some of those some group facilitators cause more problems than the students do. That's hard. (Instructor G)

Other metaphors

In addition to referring to their teaching as a journey, there were 20 other metaphors shared by lead facilitators in this study. They include:

Family: Role of a big sister or big brother (4)*
Rollercoaster (3)*
Road map (3)*
Toolbox/tool belt (3)*
Finely tuned engine/well oiled machine (2)*
Onion: Peeling the layers back (2)*
Same town; different street: Familiar but new
Swimming pool: Deep and shallow ends
Sniper approach: Catching students in the crosshairs of the teacher's scope
Dance
Rehab treatment facility: Go away, get treatment, and come back
Kitchenette: Provides the essentials but isn't extravagant like a chef's kitchen
Cleanup batter
Midwife: Assisting to birth students' learning
Fishing: Cast and reel the students in
Amoeba: Squeeze at different points to move students
Maypole (used in European folk festivals): Decorating it with students
Learning ladder
Hot Wheels supercharger

*Number of times mentioned

The participants really enjoyed sharing their metaphors. The participants' descriptions were compelling and thoughtful. The most commonly shared examples included family, rollercoaster, road map, toolbox/tool belt, a finely tune engine/well oiled machine, and an onion. Excerpts from the interviews of the most common metaphors are shared below:

Family

Yeah, I do say we're a family and I do believe that. We are a family and there's a connection I make when I'm on planes with people and they ask me what I do and I find out they're in a fraternity and not that 'Oh I was,' I'll say, 'You are.' I've never met them, they're not in my fraternity and if they are I make sure they know, 'Oh sister Chi Omega! Let me get your information. Welcome back.' You know I'm dorky when it comes to that but we are a family. (Instructor F)

I think having them become familiar with us and familiar with each other is so important that they've got to have a trust and understanding that you know this is a safe space and

that I can share a little bit more than maybe I initially wanted to share because this is a place where I'm you know part of a family. (Instructor K)

I've never thought of it consciously but now, maybe as a big brother. As the kind of classic big brother that's seven or eight years older than you. And you can share a joke you probably have a very similar sense of humored with a brother. I have three brothers so I'm well aware of this and you can kind of laugh or joke about the same things. You can like make fun of your parents or something like that and you know and kind of commiserate about being grounded or something like and I can; on top of this your brother will kick you in the butt when you aren't doing what you're older brother will specifically I'll kick you in the butt when you're not doing what you're supposed to be doing. And having had more life experiences and so can deliver a message of either don't do what I did or don't what I've seen or here's why we need to be better than that. (Instructor O)

I'd wanna be the big sister. I know that that's necessarily always how they see me, because I'm the person at the front of the room. And so it is those smaller conversations. (Instructor A)

Rollercoaster

It's like a rollercoaster once they get to that top you can cruise through. (Instructor O)

It's got to be seen as kind of this, we're all here together, we're riding the rollercoaster together. Some of us will be in the front sometimes, some of us will be in the back sometimes, but we're all on the ride, and our responsibility is for everybody on the ride, not just the person sitting next to you or the person who is behind you or in front of you, but it's everybody. (Instructor B)

Here's your metaphor. The rollercoaster. Sometimes you have to create more energy in order to continue movement. Sometimes you have to create the speed via a hill in order to get through the loop that's coming. Sometimes you need to slow it down because too much energy going into this turn will fling them off the ride. I am, however, not concerned with … that came out a little harsh, but … a little bumping, a little bruising along the way. Metaphorically, not real. So meaning we have created intentional learning. (Instructor H)

Road map

It's a road map for the experience of what's going to happen. What are they going to experience? How they're going to get there? And that ties into that expectations piece in that potentially into that; givens not flexible piece too as well but a road map for the experience together. (Instructor I)

Have we lost them completely? Have we captured them completely? Or on that continuum, where are they? Do we need to go back and un-do something? Do we need

to, I mean, like those are the things … the questions that you have to ask in the middle. And sometimes you do. Sometimes you have to just take a hard right. You weren't planning on taking a hard right, but you need to take a hard right. Sometimes you need to say, let's go back about ten miles on the road and make sure that we either pick up the road kill, or fix the flat tire that's back there that we've just driven the car for ten miles and all of a sudden the rim is now bent and we need to fix this problem right now. (Instructor B)

A piece of that that I often will explain to students, it's this idea of like, we're all on the road but were in different places but we have to all keep moving and we all just need to keep moving in the right direction and to be moving and so it's OK if you don't agree with me on everything, I probably don't agree with you on everything but are we all trying to understand more? (Instructor E)

Toolbox/tool belt

I often talk about tool belts and you know I'm giving you the proverbial tools to take them back and create something of value. I don't promise people that we're going to end up with a final product by the time they leave UIFI or by the time they graduate, but I will help you come up with your tool belt and then add some more things or you're like, 'Oh that's something, but it's really not working.' (Instructor F)

It is the long-term perspective around how do they continue this work, versus just believing it's done. I think that we are preparing them for a lifetime of learning versus 'here's my toolbox, let me move forward' and so it's how do we stay in touch with them and discover what questions they're wrestling with now, what relationships are they creating, how are they connected to the world. (Instructor C)

Most of the stuff we're talking about here is stuff you care about, and certainly some of the causes are life and death causes. No question about that. But, I also want to remind them, you're here thinking about this right now … this toolbox of stuff that we're working through this week, is really more about how you're going to use them in all aspects of your life, not just in this one thing you care about. We're asking you to focus there, but how is this going to impact your family? How is this going to affect your relationships? (Instructor B)

Finely tuned engine/well oiled machine

That the machine is still well oiled and effective. So what does that look like? It may mean that you need to have a check-in with your facilitator crew and to remind them of, 'we should be at this point. How do you feel?' You could do that with students too. (Instructor H)

How do you show up, and how engaged you are, and how invested you are. I think that's a really important thing. And, it's kind of like the hum of the really finely tuned engine. That … everything is in kind of in sync and is flowing … flow is a good word too, but it's

… when it's finely tuned … the engine is finely tuned and it's kind of performing at its optimal level, that's the way I want to be. That's the way I want to approach the week, the way I want to be seen … sounds like it's ego and it's not, but to be perceived that I am humming at that optimal level. (Instructor B)

Onion

OK here's the onion analogy I guess for lack of better way to do it. I think the first layer is you know what is this fraternity, what, what's it intended to be, what is it supposed to be, what is it written to be. The second layer is what would that look like today and how they, how they get closer to it looking like that. I want them to believe that that's possible. I guess that's a yes or no question I'd like to help them answer why, why does any of that matter? Like why is it, why should I care about some organization a values-based organization and, and leading based on those values in 2012 and at twenty years old. I'd like to help them figure that out. (Instructor N)

Well, the best one I can think of that I think really speaks to how I try to teach is really like peeling an onion … I find that I'm most effective when I do the initial stuff in a session or an experience where you get the outer layers peeled off, in the logistical first session and the get to know you type stuff that you generally do to kind of break the ice but then after that, depending on where the group is, in my approach, you can either peel the layers back faster or peel some back faster or pull a thicker chunk back. But then other times, you really have to tread lightly, and based on my observations of whether they're with me and they're with the concept that we're teaching or not, you can either start peeling thinner layers or dig a little bit deeper, and obviously I think as the experience goes on and you get to that third or fourth or fifth day, you can start to pull a little bit more because they're prepared for it and they've had things pulled a little bit earlier and they're used to you pushing them. (Instructor M)

In another vivid example, one lead facilitator provides a description of the Hot Wheels supercharger:

Remember the Hot Wheels cars? Did you have Hot Wheels? Did you have the supercharger? So Hot Wheels had this track that … this is another metaphor that I use … the orange track and you had these little connectors. Well, the supercharger was this building that had batteries in it, and it was spinning these wheels and a car would come in and it would shoot out of that other side. And it usually would work … get it almost all the way around the track. I had two superchargers so I could get it to the one side and so then you can basically make it like an oval going all the time. I liken this experience to running through the supercharger. You're coming in kind of slow, and you leave through the supercharger and you go out and you're shooting out, you're going to eventually lose momentum, but then you're going to come back through again. How do you use this experience as a supercharger when you get low or your energy is low? I use that kind of metaphor though to think about at the end of this, we want them propelling out. (Instructor B)

Additional factors cited by participants

Four other important factors were identified throughout the course of this study and emerged from the data. They include:

Utilization of a co-lead facilitator model
Serving as a small group facilitator prior to being a lead facilitator
Lead facilitator's experience with the organization
Belief in their fellow small group facilitators

Each of these factors serves as a contextual piece or as a foundational understanding about this research and was discussed at length by the overwhelming majority of participants, thus warranting their inclusion. A brief description of each of these is provided below.

Utilization of a co-lead facilitator model

This research is based on a co-led or co-teaching model. Throughout the course of the interviews with the 15 participants, good lead facilitators commonly referred to their relationship and partnership with their co-lead. Their discussion about this relationship covered and spanned all of the 27 coded and themed categories in this study.

Lead facilitators recognize that they are not alone in the leading of the institute. Several leads spoke about balance with their co-lead. They take the time to know their co-leads' strengths and weaknesses, share their own, and work together with their co-lead to use each other's skills. Good leads own their space but they give up the space they need to for their fellow co-lead or other facilitators to be successful. They recognize that there is a shared responsibility for learning and understand how they can complement another co-lead and have high expectations that the other co-lead will also examine how to be supportive. The following excerpt from one interview helps to provide further clarity on some of this balance and understanding:

> *Right off the bat for me it's important to get out of the curriculum and to get to know them as a person. So spend some time together, because ultimately as co-leads it's your responsibilities to manage the program and ultimately it's ultimately up to us whether or not the experience is successful. And while it's a lot of pressure it's good to know that the co-leads have each other's back in that process as well. After that, it's important to know how to best support one another – so what are each other's needs and strengths so that you can find a balance. So, not only learning how to read them but how to communicate with them about, this is a moment where you can step up for me and this is a moment where I can step up for you. It's also making at least preliminary plans of whose going to be leading which sections of the curriculum is important or taking the lead on that section of the curriculum. (Instructor I)*

Good lead facilitators also know that their role is more than just good preparation for themselves, it's about being responsive to their co-leads, figuring out how to adapt, and it's about making sure those who are on their team can be successful as well.

Serving as a small group facilitator prior to being a lead facilitator

A common characteristic of all good lead facilitators involves all of them participating as a small group facilitator prior to serving as a lead facilitator, in some cases multiple times. Because lead facilitators have served as a small group facilitator prior to being a lead facilitator, they have a greater understanding the program, role, and expectations. By serving in this small group facilitator role, they have watched, learned, and observed what other role models and lead facilitators have done. This also has given them greater familiarity of the curriculum from the inside out.

Serving in this small group facilitator role first helps them as a lead facilitator in several ways. They understand small group facilitators' expectations and are better able to manage them. Lead facilitators are committed to good experiences of facilitators, often as much as they are the students'. Their knowledge of and relationship between themselves and the small group facilitators helps them to create team and use these teams effectively. They utilize the small group facilitators to help create the best experience possible for students. In addition, they value

the experience for colleagues and want their small group facilitators to develop professional skills.

Lead facilitator's experience with the organization

A common characteristic among the vast majority (10 of 15) of good lead facilitators was their more than average level involvement with the organization that manages each institute. Seven of 10 have coordinated at least one national or campus-based institute, five of 10 individuals have been or currently are employed by the organization, five of 10 have written some curriculum for the program, four of 10 have managed the institute on a national level, three of 10 have served as volunteers for the organization, and two of 10 have served in a board capacity for the organization. Each of these roles was in addition to their role as a lead facilitator.

This clearly shows that the participants in this study are invested in the organization, program, and cause. In some cases, they are members of the organization or association or have deep connections to these organizations. A piece of what makes them good lead facilitators is the fact that they've had similar experiences to the students participating, have intimate knowledge about the organization, are members, do or have managed the program, or work for or toward the organization's success. This undoubtedly highlights that the majority of lead facilitators significantly value the organization for which they are facilitating, above and beyond their role as a lead facilitator.

Given the large number of lead facilitators who were initially nominated as good leads by the participating organizations in this study, this factor seems correlated but not causal. In addition, there were other good lead facilitators who participated in this study without this heightened level of involvement. One lead facilitator in this study mentioned in their follow up

interview that this fact might be attributed to their significant level of relationships with the people in the organization. Nonetheless, it seems appropriate to mention this phenomenon as a finding of the majority of participants in this study.

Belief in their fellow small group facilitators

Lead facilitators in this study had a strong, positive belief in their fellow facilitators. Good leads are more than just participant centered. While their belief in their co-lead is highlighted above, this finding refers to their belief in their small group facilitators in each institute. They recognize that it is their job to help the other facilitators be successful. Because they have served in the role of a small group facilitator prior to being a lead facilitator, they have intimate knowledge and understanding of that role. Given that the institutes employ a team teaching model, this makes these learning environments distinctly different from traditional classroom learning.

Good lead facilitators understand that there is a process for engaging their fellow facilitators and develop an approach to making sure the small group leaders, often not having extensive facilitation experience or often not as familiar with the institute curriculum and environment, feel confident.

> *We make sure that we share that with them so that even if they are not facilitating a large group session they can understand some of the changes that are going to happen. (Instructor F)*

Good leads recognize that their team brings different skills and they have to capitalize on those skills and they seize opportunities to connect with their co-leads and small group facilitators to create an environment in which they can work successfully toward an end goal. They establish relationships in order to ensure that their fellow facilitators are comfortable and in turn all are able to help the students.

The other thing is making sure that the faculty are comfortable with their roles, but also uncertain about what's going to happen and being OK with that. (Instructor B)

Good lead facilitators work to implement the curriculum in a way that is appropriate for their skills and depend on the small group facilitators around them to help accomplish the learning objectives for the institute. While the coding in this study was focused on their role as instructors for students, the participants in this study often referred to supporting the small group facilitators and implied that what they do to and for students may well apply to their role with the small group facilitators as well.

Conclusion

This dissertation explored what 15 good lead facilitators do in long-standing, co-curricular, multi-day, undergraduate college and university leadership programs through qualitative interviews. The findings presented provide what qualitative researchers refer to as thick or rich description of the participants involved and for each of the research questions in this study. Metaphors for lead facilitator's approach to teaching were shared providing insight into their approach. Lastly, four other factors were offered as important underpinnings for context in this research.

Chapter 5

Discussion

Introduction

This chapter is organized in six distinct sections. The first section discusses the contribution that this research makes, particularly with regard to the research questions in this study. The second section provides an expansion of thought and possible suggestions are offered for lead facilitators, institutes, and organizations. Third, recommendations for selection and training with possible guidelines are proposed. Fourth, potential implications for the selection, training, and evaluation of lead facilitators as well as implications for organizations and other programs are offered. Fifth, future research suggestions are presented. This includes recommendations for additional research about institutes, lead facilitators, and the development, progression, and evolution of lead facilitators. The sixth and final section, offers my own conclusions and final thoughts.

Contribution to undergraduate leadership programs outside of the classroom

Despite recent growth in undergraduate leadership programs in U.S. higher education, there remains a void in the literature regarding what constitutes good teaching practice in co-curricular, undergraduate leadership education programs. This study helps to address that void by examining effective teaching practices in one such type of program: the multi-day, one-time leadership programs for college and university students that have been in existence for at least ten years.

The National Association of Scholars responded to the *Student Learning Imperative: Implications for Student Affairs* (American College Personnel Association, 1994), *Learning Reconsidered* (Keeling, 2004), and *Learning Reconsidered 2* (Keeling, 2006) in a statement

entitled *Rebuilding Campus Community: The Wrong Imperative* by challenging that this movement of "educating the whole person" and "the student learning imperative" were "teachers of what?" and "by what means?" in their "indoctrination" of students (National Association of Scholars, 2008, July 16).

Dalton and Crosby (2008) carefully articulated this point by asking, "to what extent do student affairs leaders (both professional and paraprofessional) have the requisite knowledge and skills to teach and lead the learning centered activities for which they are given responsibility" (p. 4)? Dalton and Crosby (2008) went on to say:

> "The student learning documents do not sufficiently address the issue of knowledge, skills, and training required for the teaching of transformative learning activities in out-of-class settings, and this topic needs more attention" (p. 9).

Dalton and Crosby (2008) further stated:

> "…the practice of utilizing student paraprofessionals as teachers and leaders in many student affairs education programs leaves the profession vulnerable to complaints about training and expertise. In order to advance the agenda of transformative education it is especially important that standards of knowledge and expertise be clearly defined for learning centered out-of-class activities" (p. 9).

From the limited literature of institutes, we know some things about the impact of long-standing, multi-day, co-curricular undergraduate college and university leadership programs (Ballard et al., 2000; Barbuto Jr. et al., 2003; Biddix & Underwood, 2010; Bureau, 2010; Dial, 2006; DiPaolo, 2004, 2008, 2010; Maxwell, 1998; McRee, 2010; Pugh, 2000; Rosch et al., 2011; Rudisille & Violett, 2011; Stoker, 2010; Summers et al., 2004; G. E. Taylor, 2010; Tener & Fisher, 1997; Zimmerman-Oster & Burkhardt, 1999a, 1999b; Zogg & Mastalski, 2008), but there is little empirical research about the impact of teaching in these programs. As a result, at the time of this study there is almost no known literature that informs the role of the instructor in

these institutes. Therefore, we do not know how to help organizations' craft training programs and help their instructors become better.

This study attempted to answer this question by using methods developed by Ken Bain and his 15-year research study and book *What The Best College Professors Do* (Bain, 2004b) to identify good teachers in these emerging co-curricular, undergraduate leadership programs. In doing so, there will be significant value added to the understanding and impact of leadership training, particularly with the regard to the role of instructors, in other co-curricular, undergraduate leadership programs.

This study incorporated purposeful sampling and snowball or chain sampling procedures were used to obtain information-rich cases. Each of the four organizations was asked for their expert nominations of their best lead facilitators (instructors). The organizations internally determined whom and provided the rationale for how they selected their best teachers. Three of the four organizations provided several possible lead facilitators who met their criteria and those organizations that provided more than 10 possible participants were asked to further narrow down the list.

Participants were identified, contacted, and 15 chose to participate in this study. Participants were interviewed twice. Initial interviews were conducted in person or over Skype and follow up interviews were conducted over the phone. The interviews were transcribed, read through, and open coding was done by hand. Once the codes had been labeled or "named," they were grouped into higher order categories. Ultimately, the 1,328 applications (occurrences) of codes fell into 27 unique categories that were identified from the 15 interviews. This resulted in the following breakdown: 11 categories mapped to the meta studies about good teaching in the classroom, six categories mapped to my early research project on student perceptions of good

lead facilitators, and 10 additional categories emerged that were identified from the lead facilitators themselves. The codes were reviewed and confirmed by an external auditor (J. L. Arminio & Hultgren, 2002; Kvale, 2007; Kvale & Brinkmann, 2009; Patton, 2002) between the initial and follow-up interviews. Each of the 27 codes was mapped back to my research questions in this study.

The follow-up interviews were conducted to verify and confirm the coding, findings, and framework. All follow-up interviews were conducted over the phone. Each application (occurrence) of the codes was taken from the transcribed interviews and categorized by similar theme under each of the 27 codes. This information is provided below in my research questions and findings.

The primary research question guiding this study is: What do good teachers do in college/university multi-day, one-time, co-curricular leadership programs? Six sub questions, derived from Bain's (2004b) study, were asked of teachers indicated to be excellent:

1. What do good teachers know and understand?
2. How do good teachers prepare to teach?
3. What do good teachers expect of their students?
4. What do good teachers do when they teach?
5. How do good teachers treat students?
6. How do good teachers check their progress and evaluate their efforts?

As a result of asking these questions, several narratives of what good lead facilitators do emerged. Good instructors in institutes provided, what qualitative researcher say, thick and rich description. While there is no one model, there did seem to be consistency among the lead facilitators of what they do. The findings for each research question are presented in chapter four.

The findings from Ken Bain's 15-year research study and book *What The Best College Professors Do* (Bain, 2004b) were interestingly similar. What did professors know about how

we learn? Bain found that professors knew that knowledge was constructed – not received, mental models change slowly, and questions and caring was crucial (Bain, 2004b). How do professors conduct class? Bain found that there were seven unifying principles and four techniques used for employing the craft of teaching in the classroom. The seven unifying principles are: (1) create a natural critical learning environment, (2) get their attention and keep it, (3) start with the students rather than the discipline, (4) seek commitments, (5) help students learn outside of class, (6) engage students in disciplinary thinking, and (7) create diverse learning experiences (Bain, 2004b).

Additionally, the summarized research on the seven principles for good practice in undergraduate education by Sorcinelli (1991) discusses these principles first developed by Chickering and Gamson that seem to be linked with the statements about what good lead facilitators do during institutes. Good practice encourages student-faculty contact, good practice encourages cooperation among students, good practice encourages active learning, good practice gives prompt feedback, good practice emphasizes time on task, good practice communicates high expectations, and good practice respects diverse talents and ways of learning (Sorcinelli, 1991). Furthermore, Sorcinelli found a link between student learning styles and instructional methods that can lead to improved learning.

Expansion of thought and possible suggestions

Throughout the course of this research study, my thinking was expanded. As a part of the qualitative design, my interview protocol began with questions that were developed by Ken Bain in his study about what the best college professors do (see Appendix D). This research built upon his research about what good teachers do in the classroom and intended to see what, if anything, applied to the unique contexts of long-standing, co-curricular, multi-day,

undergraduate college and university leadership programs. Part of the interview design included a semi-structured interview process enabling the participants and the researcher to go where the conversation led them in the exploration of what good lead facilitators do in institutes.

I discovered that the lead facilitators also were very curious to know more about the findings. I started with the questions provided by Bain, but because this study was qualitative, it enabled us both to expand our thinking during our conversations. Almost as if the participants were co-investigators, we began exploring this phenomenon and deepening our discourse about these questions. In particular, when asking the question of "Is there anything else you would like to add?" in the first round of interviews (Appendix D) and "What question have I not asked that you were expecting or would like to answer?" (Appendix E) in the second round of interviews, lead facilitators began sharing the types of questions they would like to have answered. When the participants posed these questions, I took note of them, and asked for their initial reaction and thoughts as to how they would answer their own question.

To my amazement, every individual participating in this study posed a question of something about which they would be interested in knowing more. In some cases, individuals posed more than one question. I found these questions and their answers to be fascinating and astute. Because this was a qualitative study, it allowed for much richer potential insights to be uncovered and provided several possible implications for these programs, the lead facilitators, and for the organizations that manage them.

Because I did not expect that all of the participants would propose additional questions, and because of the time limitations I had for the completion of this study, follow up and further research into these questions were not a part of its design. However, I have included all of these below. Whether any or all of these questions applied to every program in this study remains to

be seen. The passages below provide greater context and understanding of each of their thoughts. They are grouped by impact in the following ways: lead facilitators, institutes, and organizations.

Lead facilitators

- Are there similar shared values among all good lead facilitators? What are they?

  I think it would be great for you to ask what our values are. How we live our lives, because it's a question that I ask of students and I know that I asked it of my friends, too. 'What values do you live your life by?' I don't think that we ask that question enough. I think asking values based questions like that would be interesting for our facilitators because I think all of us probably have very different personalities, and I would be curious if our values are similar or if maybe what is similar about us – the values component is so pertinent to what we do. I would think that great facilitators are great facilitators every day in life too – if you care about these institutes and what they stand for. (Instructor F)

- What do you think you are not good at? Why?

  The things that are running through my head are things around 'what do you think you're not good at?' (Instructor C)

- What are the five most important skills of a lead facilitator? How do those compare among lead facilitators?

  Maybe it's asking the question around if you had to … rank five critical skills for effective facilitation, what would they be? It would be interesting to see what the similarities are across the types of experiences because … I think humor is very important. I think listening is incredibly important. I think the appropriate use of technology is really important. And you've heard me say over and over, I think the investment thing is probably paramount, probably number one. (Instructor B)

- Would one lead facilitator be better than two?

  Common sense tells me that learning from an institute with one strong lead would not be as good as an institute with two strong leads. But I don't know if that's the case. What I'm wondering is, could the learning from two institutes be equal if institute A had one good lead and institute B had two good leads. I don't know. I think the counter argument is could two good leads cancel each other out? I don't know. (Instructor N)

- Would three lead facilitators be better than two?

I wouldn't mind going into why I did not like the three lead facilitator approach. I don't know if that is beyond what you're looking at because that's a philosophy thing. Is that OK or is that not relevant do you think? They've done it before I did it – I've known of at least one other time that they did it. I think they do it sparingly. (Instructor O)

- How do lead facilitators vary their approach in teaching students versus teaching small group facilitators? Do they vary their approach?

  One thing that maybe we didn't discuss that I think is a valuable is the large group/small group facilitator dynamic and how is my approach maybe different in trying to teach students versus trying to teach and coach and rally a group of real peers. They are having an experience that's different because they're in the small group conversations and breakout sessions that I am not in, so oftentimes their work is harder than mine because they're always on. They're on in the large group sitting with different students, engaging in conversations, and then they're on in their small groups. Just like I listen and say it's important to care about the students, it's important to listen and care and seek out feedback and reactions from those facilitators as well, because they may be seeing something that the two of us as leads don't see. They may have a suggestion, there may be a student that's a real struggle that we don't know about, or a student that is a real rock star in their small group that doesn't say much at all in the large group. (Instructor M)

- How do lead facilitators gather and utilize real-time feedback from co-leads and small group facilitators about their performance?

  In the lead role, it's important to be continually checking in with a co-lead. How did you think that went? How did you think I did? And being ready and being open to hearing that. I often also find that from the small group facilitators, that there will be someone who will emerge as like, my feedback gage and they're in the back of the room going 'you're missing it' or 'more!' Or 'dig deeper' and they'll be giving that. There will be somebody that will kind of emerge that I'm watching, continually, to see how I'm doing so that seeking feedback piece is a big part for me because I could be thinking it's going great and if it's not then we're completely missing the boat. (Instructor E)

- What do lead facilitators do when things don't go well? What do they do if they dislike a portion of the curriculum?

  Lastly, things I disagreed with or didn't like about it. (Laughter) There's always those things that in terms of the curriculum standpoint – we all have those experiences – where some section is going horribly wrong and how do you right the ship and make it work? There's definitely been those components. (Instructor K)

- How important is the experience of the lead facilitator? What type of experience is more or less helpful?

I would underscore, having tried to have observed as best I can my own style, and sensing reactions or feedback, that's come over a number of years, as well as having observed others in co-lead situations, one can't underestimate the importance of experience … those leads who have been the best have been those who have had to navigate large group facilitation before. Someone who can, at the ready, recall content, or examples, and have enough confidence in their own, not that they have to have the answer for everything, but that they are experienced enough in knowing how to facilitate an issue, however it may be posed, in satisfactory or exemplary terms. That experience is critically important, whether it's their own personal or professional experience. (Instructor L)

- Why do you continue to be a lead facilitator? What motivates you to do so?

Why do I do it? What do I love about it? I'm not sure if that wasn't asked in a way. What has me spend my time in this way? Why do I do that? Why do I lead these institutes? Because they are spaces for me to continue doing my own work around asking the big questions, right? So in the institutes while I'm asking them, I am asking them to myself again and I am getting clearer about them so I can show up in more clarity as a leader in the world and I really do feel like I am preparing my legacy and setting up the world to be better. I'm doing what I believe that I've been purposed to do, which is to help heal the planet and that is about helping to provide it with good leadership, visionary leaders, who can see the invisible and expect the impossible and move into that. So why I do it is – I do think that we need a world with leaders with those skills and passions and proclivities and competencies and ideologies. (Instructor D)

- Why do you do it? Why do you feel these programs are needed?

Why I love to do it? Why do I keep coming back? I ask myself that constantly. I have chosen teaching facilitating, educating as a profession, and that may not be everyone. If people give their time, they have chosen it. There are lots of ways the curriculum and institute can be delivered particularly in a digital age … why does this feel necessary? And I do. I love the process of … being in … a group for that long; there's something about the intensity of it. It's about creating a community and having people understand the possibilities that exist when we have a community like that … and I wouldn't want this delivered by a talking head, or that people could get this you know on a disc and if you watch this disc over five days. I think a human-to-human connection with this curriculum is necessary. And I love it. There is so much potential in people. And I want to assist in that birthing process of that potential. That's why I teach. That's why I love education. That's why I love having people think, and be, and be together. Watching people really be in community and … hold that the world can be great and really, really believe that. And they may forget it and not believe it the next hour that they leave … that they felt it for just a little bit, and I love that. (Instructor A)

Institutes

- Does context matter?

I think of Barbara Kellerman's triangle of leadership: leaders, followers and context, and I wonder how much context matters for all of this. I don't know. But that's what comes to mind. (Instructor C)

- Does the live-in aspect of the program influence or impact it?

  Living in does influence the learning experience differently. Having it be a live-in concentrates the experience a little bit more strongly. I think about the students at an institute who are checking their cell phones, or who have to or who are making phone calls home, and I think that if they were driving home at nights, that that would be problematic. In fact, I remember one year when one of the first years that I-LEAD® was held outside of Indiana, there were some local students there … who weren't taking full advantage of the curriculum because they were at home and so it wasn't a change in their environment for them; and then because they knew the local spots, were sort of the ring leaders in creating some of the cliques that would separate themselves from the groups. I see that as unfortunate. I don't think that they were maximizing the experience, and that makes the experience richer; gets them out of their comfort zone a little bit more. (Instructor I)

- Do institutes require a pinnacle point or peak experience during the program to be successful?

  At the Wooden institutes there is a session which only Betas are allowed to go into, and it's really kind of the pinnacle experience. It really challenges. It's built up for three days and we're at this point really hitting them in the gut. The challenge of living by the values of the fraternity; and that session, to me, was the most powerful session for when I was a participant. It's just the pinnacle of the experience in many ways. And that's the session that if I didn't walk out of that feeling good, I would have felt like I let the institute down … that I had not accomplished my goal of being there, which was to provide a breakthrough experience for the participants. I hate to whittle it all down to one three hour block during a five day experience that was my goal … to make the Hall of Chapters session as outstanding as possible. (Instructor O)

- How important is the curriculum compared to the instructor?

  No matter how good a facilitator you are, a crappy curriculum will not lead to good results. So the curriculum writer is a key part of this and organizations that don't think that curriculum matters find out the hard way that it does. You can be a fantastic facilitator with a crappy curriculum. It's still a crappy curriculum and you're still a good facilitator. We went through that here. (Instructor H)

- How do individuals who have participated in similar institutes compare them against each other? Does this impact their experience? Does it impact others' experience?

Like for I-LEAD® for example, we've had students that participate that have previously been a part of LeaderShape®. Or facilitators who have maybe facilitated at LeaderShape® or vice versa. Don't compare it. Don't bring judgment and expectations from other experiences in. Because then you're not going to get everything out of it. I think it's both for the students and facilitators. We always talk about trust the process; there's been curriculum in place and they review the curriculum, and there are goals and there are learning outcomes and everything is intentional. Just trust that people have looked that through and have gone over it with a fine tooth comb and maybe it doesn't work like we thought so then we tweak it for next time, but to not compare it to other times, because then you won't be fully there and you won't be fully immersed whatever the program is. If you're thinking the whole time – well I did such and such and it wasn't anything like this, it was so much better – I think that's important to not pass judgment on what's happening. (Instructor J)

- How important are the individuals who serve as small group facilitators? What parts of the curriculum are most important?

  You haven't asked much about small group facilitators. Because I think so much of being a large group facilitator is not only the students' journey but the small group facilitators' journey. That was always really important to me. I wanted every one of those twelve or fourteen people to leave there wanting to do it again and that was professional development – that was mentoring young professionals and even being mentored by. I wanted to have someone there in addition to myself that: number one they were another seasoned professional that could you know get excited about the association with these new staff and at the same time two that they could mentor and work with me. You know recharge. I always left that way, so I think small group facilitators are such an important component. I think that in terms of individual components of the curriculum, I mean you haven't asked much about that. I would assume that a lot of the curriculums are very similar with a community service piece and a diversity piece and a leadership thread and an organizational theory thread. Those pieces are all really important and it would be interesting to me to see what are the threads that other lead facilitators saw as part of their curriculum. (Instructor K)

Organizations

- How do organizations identify good lead facilitators? Are they always good?

  I've done four institutes for them as a lead right, would they have identified me as a good lead from all four, or from two of the four, and was that because of who was my co-lead, I don't know. (Instructor N)

- How do lead facilitators use evaluation to improve? What role does the organization play in providing this?

  We touched on it a little bit but I think probably evaluation of lead people. What I would hope that I could walk out of the experience knowing where I could improve. And I'm not

necessarily certain that I get that. That's something that I wish… I don't think that we've talked about much today. (Instructor G)

- How does potential bias influence or impact assessment and evaluation of the program and the lead facilitators? Are students biased in their evaluation?

  I think that that all could be tied in assessment too. Like that same question that I have about assessment of the whole program can be tied in with assessment of the lead facilitator. If your co-lead provides you with – well I think you could have done better on that I'm willing to take that, but is that really grounded in anything other than observation. What I'm saying – could there be personality tied up in that and could there be all kinds of other stuff tied up in that? Likely. And the same with your facilitators – I think there's all kinds of stuff mucked up in there and for sure with your participants. So I don't know how you evaluate that. (Instructor G)

- How do organizations pair lead facilitators together?

  The other thing that I think that is something we haven't talked about, we alluded to it a little bit, is the pairing of leads. I think they're certain people that when I would think about leading the UIFI with them, I would turn tail and run. And other people where I just know we're going to be in sync the whole time and how that paring happens. There are people that I would say that I wouldn't be willing to be paired with at this point in my life because it would be too much like work then, right? I think there's certain people where I've observed their style or I've interacted with them enough where … I would feel that it wouldn't necessarily compliment my style or, I'd have to do the majority of the heavy lifting in the program and that wouldn't feel good to me. There's people I think that you naturally gravitate towards because you have a chemistry and you complement one another where one kind of falls short the other can kind of pick up. That makes it easier. The worst ones to do are the ones where you have no fun. I remember I did one where about 2 ½ days into it I wanted to go home. And it's the only one where I laid in bed that night saying I don't want to be here, I don't think this is any fun; I'd like to check out right now. That's only happened once and I hated it. (Instructor G)

Recommendations for training and evaluation

Within elementary and secondary education, the use of teaching performance assessments is relatively common (Pecheone & Chung, 2006; Performance Assessment for California Teachers, 2012). This is less so within higher education and there are no known teaching performance assessments designed and used for multi-day, co-curricular, undergraduate college and university leadership programs. In the development of the framework provided in this study about the evolution of good lead facilitators, it emerged that many of lead facilitators

were not being evaluated significantly, if at all. This virtually left them to their own devices and accord. The evaluation of lead facilitators in these programs could be improved. The development of possible guidelines would be beneficial to the organizations that manage these programs as well as to the lead facilitators.

During the course of my study and research about good lead facilitators, it became apparent that the findings in this study might further the selection and training of good lead facilitators if it were developed into a framework that would enable both organizations and lead facilitators to assess or self-assess their performance. It may be possible to help and support both by proposing guidelines for evaluation based on the 27 themes of what good lead facilitators do in multi-day, co-curricular, undergraduate college and university leadership programs. For goodness to be achieved, the researcher must present recommendations and implications for professional practice. Researchers should not engage in research for its own sake, but rather Arminio and Hultgren (2002) suggest that it "improves the lives of others" (p. 457). The research and findings should illustrate new insights for professionals that are seen as useful. This comes through providing recommendations on how practice can be improved and by "shedding new light on teaching and learning" (J. L. Arminio & Hultgren, 2002, p. 458). Based on the qualitative interviews in this research, I propose some potential suggestions for practice below, prioritized in order by the frequency of the application (occurrences) of codes. Each of the following suggestions came from the comments made by one or more interviewees during the interviews.

Student-Centered

- Make the experience personal to students in whatever way they can.
- Help students not only know but apply the content.
- Believe in students.
- Help students imagine a new world of possibilities.

- Teach and facilitate from a passion for students.
- Approach is grounded in being student-centered and manifested by their words and actions.
- Know students on a personal level.
- Utilize off curriculum time for more casual one-on-one conversations.
- Make the curriculum and experience personalized to each student and their background.
- Help students increase their skills as a leader, become more competent and confident.
- Know and use students' names.
- Help students feel and become more comfortable in the learning environment.
- Work to think about things from a students' point of view.
- Put themselves in students' shoes and use this approach as another connection with them.
- Focus on being present and take their time and investment seriously.
- Value relationships.
- Provide appreciation and encouragement.
- Maintain a commitment to students over time.

Conducive Learning Environment

- Foster a safe environment in which people understand their responsibility to help others around them learn.
- Help set a solid foundation for learning with ground rules and shared expectations.
- Have exceptional awareness of what students are contributing to and getting out of the experience.
- Promote connections and build community.
- Create a safe and nonthreatening space where students are allowed to make mistakes, fail, and for learning to occur.
- Recognize the importance of the physical learning environment.
- Give time and attention to the space in order to create optimal conditions for learning.
- Craft a fun environment for learning.
- Encourage students to let their guard down and be open to learning.
- Work to create a setting that's conducive for students' well-being.
- Desire for students to be significant contributors in their environments.

Expert Presentation/Delivery

- Use stories to personalize their instruction for students.
- Use approaches and techniques designed for multiple learning styles.
- Find ways for all students to become engaged.
- Alter their teaching and facilitation approach as needed.
- Pay attention to group dynamics and utilize these clues to guide their approach.
- Focused and present.
- Knowledgeable and competent in multiple subject areas.
- Serve as a guide for students, helping to map out a thoughtful approach to improve students' comprehension and understanding.
- Use observation to constantly assess where the group is and to gauge the effectiveness of the learning environment.

- Make concepts real in a way that improves students' understanding.
- Balance, share facilitation, and work as a team with their co-lead.
- Apply techniques of good teaching and instruction to help students remember, recall, and retain the learning.

Care & Compassion

- Create a culture of care and invite students to care about others and themselves.
- Recognize that students have their own stories and respect them.
- Help to make things personal.
- Empathetic and demonstrate care and concern.
- Help students have a healthy sense of what they feel is impossible.
- Focus on knowing the students and engage with them genuinely.
- Recognize the need to affirm students.
- Reassure and make content contextualized for students.
- Understand the distinct needs of each student.
- See students as real people; show interest in what they care about and what moves them.
- Create an environment where all are respected, appreciated, and valued.
- Value their relationship with students and encourage them whenever possible.
- Invest in students, champion them, and serve as a cheerleader for their success.
- Give students a chance to redeem themselves if they've made a mistake.

Personal Disclosure/Vulnerability

- Not afraid to share when and where they have fallen short.
- Willing to risk not looking good by putting themselves out there and be vulnerable for the sake of learning.
- Talk honestly about their struggles, successes, and expertise.
- Use the self as an instrument for learning.
- Share their life experiences as examples.
- Skilled at creating a learning sanctuary for students' optimal education.
- Allow for open exploration on topics together.
- Share appropriately their thoughts first to remove any perceived power in the relationship.
- Generous and share what they are passionate about with students.
- Set and keep appropriate boundaries.
- Share relevant and timely stories that make real connections with students.

Passion/Enthusiasm

- Approach every interaction with students as another opportunity for learning and growth.
- Do not shy aware from sharing their emotions.
- Give and invest 100% in every way.
- Reorganize their life so that they can be fully present and available – to and for students.
- Persuasive.
- Resolved to help students be better.

- Know how to win students and facilitators over with their passion.
- Give energy to the group.
- Perceptive and can sense what the group needs often before they realize it themselves.
- Know why they do this.
- Believe passionately in students.

Critical Thinking

- Invite students to dwell in questions.
- Help make meaning for students.
- Challenge students and facilitators to go to places they have not gone previously and provide support as they explore these issues.
- Push students to examine previously held worldviews.
- Help students and facilitators to critically think.
- Promote more complex thinking about realities, challenge dispositions, and safely force students to question their experience.
- Make the experience about students.
- Help students take in information, conceptualize it, and make it their own.
- Inspire deeper thinking about what's being said, taught, and experienced.
- Help students peel the layers of the onion back to reveal what's beneath the surface.
- Utilize a combination of silence and compelling questions to help students take concepts to the next level.

Master of Content/Knowledge

- View preparation as paramount to success.
- Do their homework.
- Recognize how components of the curriculum flow together and help students connect the dots.
- Prepared to present and facilitate the content while adapting to the environment as needed.
- Use proven teaching techniques and models as well as frameworks and theories to facilitate the curriculum.
- Keep in mind the long-term objectives of the program.
- Understand the greater good.
- Prioritize appropriately the outcomes of the program.
- Understand the intentions of the experience and how the curriculum is developed to accomplish said intentions.
- Take theoretical concepts and help students apply them in a way that makes sense.
- Help students recognize how they can use what they've learned.

Role-Modeling

- Demonstrate leadership for students and other facilitators.
- Aware of their presence and understand their role as a facilitator.
- Are both an educator and a learner.

- Role model what they are teaching in and outside of the learning environment.
- Do not make it about them.
- Willing to go first and use themselves as an example.
- Consistent in who they are even when they are not teaching or facilitating.
- Allow for students and facilitators to share voice and co-create the environment and space for optimal learning and education to occur.
- Help to prepare students and facilitators for leadership roles.

Fair/Timely Feedback

- Constantly checking in.
- Do not shy away from having tough conversations.
- Provide critical evaluation to help students grow.
- Recognize the value of feedback and provide additional insights in assessment.
- Capture moments; they're opportunists.
- Seek feedback from everyone in order to improve.
- Utilize a team approach to assess where the group is.
- Understand their role in providing awareness but don't direct.

Refection

- Understand that part of learning is taking time to reflect on what's happened.
- Know that it's key to capture thoughts and feelings in the moment to take things to the next level.
- Have a natural curiosity about how to be better and they seek feedback in order to elevate their game.
- Want students to know why they succeeded, or if they didn't, why they didn't.
- Reconsider past experiences and use them to inform new and different approaches.
- Have had experiences that enlighten their approach.
- Know that grappling with big picture and big life issues takes time.

Authenticity

- Know their limitations and understand where they can best contribute.
- Balance when something is about them and when it is not about them.
- Recognize the significance of how they show up.
- Comfortable with themselves and support others being comfortable with themselves.
- Self-expression is a part of who they are.
- Credible.
- Genuine in their commitment and beliefs.
- Show up as real in all aspects of their life.
- Do not shy away from sharing successes and failures.
- Take the focus away from self.
- Positively influence students and their colleagues.

Availability to Students

- Meet students where they are.
- Make time for the affective side of things, help students understand issues, apply them, analyze them, and make sense of them for their individual context and feelings.
- Size opportunities to connect with students in and outside of the institute.
- Recognize their commitment goes well beyond the time of the program.
- Accessible to having meaningful conversations when students are ready to have them and realize this doesn't always happen during their facilitation or set times of the curriculum.
- Make it about the lessons, not about them.
- Are always on.
- Fully invest in students and facilitators and exemplify this commitment.
- Handle and manage their own affairs prior to and during the institute.

Integrity/Ethics

- Live the lessons they are teaching every day, believe in them, and practice the skills they teach.
- Recognize that students learning, growing, and changing.
- Challenge students, facilitators, and themselves on their values, beliefs, and mental models.
- Help students feel confident while allowing them to make mistakes.
- Find opportunities for students and facilitators to practice their values.
- Support individuals in values-based decision-making.
- Act as a strong organizational steward.
- Represent the vision and mission of the organization.
- Lead with integrity.

Listening

- Listen at all times and be engaged.
- Attend to basic human needs.
- Become invested in knowing the individual stories of participants and engage them in ways that help students contextualize their experience and knowledge.
- Know when to be quiet.
- Know how to engage non-active participants.
- Do not have prepared answers to students' questions.

Experiential Learning

- Recognize students' level of engagement and utilize diverse approaches to learning.
- Help to facilitate disengaged students and steer them in the appropriate direction.
- Use tactics for students that meet their needs.
- Monitor students' verbal and nonverbal behavior and identify how they can work with others to involve them.
- Understand different theories and frameworks for different student populations.
- Develop strategies to get students involved.
- Help to facilitate an appropriate group process so that everyone is included.

- Are not one dimensional in their approach to student learning.
- Knowledgeable about all students and student subpopulations and seek to know and understand students individually.

Questioning

- Have a talent for asking open-ended questions.
- Allow students to marinate in questions and help them come up with their own answers and find their own truth.
- Invite students to respectfully question everything, including authority.
- Push boundaries appropriately.
- Challenge students in new ways that allow them to question truths.
- Willingly create dissonance for learning to occur.
- Capture students' excitement and present big questions for them to grapple with.
- Provide a safe space for questioning.
- Manage expectations, challenge them, and reform them.

Managing Diversity

- Help students and facilitators understand difference.
- Encourage students to have meaningful conversations about life experiences.
- Have done their own work on their identity and understand how this informs their approach.
- Work to validate the experiences of students while also encouraging them to understand different approaches that may help them be more successful.
- Want to engage all voices and help students struggle through how they come to perceive those different than them.
- Use tactics to make students feel connected, empowered, and safe.
- Use past experiences, frameworks, and mindsets in order to inform students and their own thinking.
- Accepting of all backgrounds and identities.
- Believe that a more diverse set of backgrounds and experiences leads to richer dialogue and discussion.
- Make sure all voices are respected, heard, considered, and valued.
- Help students explore how diversity influences their lives and challenge their beliefs about diverse perspectives.

Humor

- Use an appropriate level of humor with students.
- Are not afraid to mix it up, be silly, goofy, or seemingly ridiculous with students.
- Use what they've learned as a result of life experiences and can see humor in them.
- Manage a spectrum of emotion with students.
- Have a wide range oscillating between seriously somber to hilarious.
- Recognize the importance of maintaining a light-hearted environment.
- Enjoy being with and around students.

- Use humor as a way to draw students in.

Trust

- Trust and believe in students and facilitators.
- Approach their teaching and facilitation like a supportive family.
- Do not dictate how students come to think.
- Provide perspectives and ideas but trust that students can take their own individual experiences and make sense of the information.
- Place trust in others and provide leadership that allows others to trust them.
- Believe in students' potential and that they are capable of doing great things.
- Have a commitment for students to be better and help students see this ability in themselves.
- Ask students and facilitators to trust the process but understand that it is not a blind trust and that it must be established through credibility and proven through actions.

Energy

- Give it their all.
- Give everything to the experience, go above and beyond, believe this is more than a job, and act accordingly.
- Intentional with their desire to help and change students.
- Demonstrate a commitment for students to have a transformational experience.
- Have fun with students.
- Project and give energy to the group.
- Develop an awareness of balance and support others in finding theirs.

Flexibility

- Realize there are different ways to accomplish the same outcome.
- Tailor their instruction to the individual as much as possible.
- Know how to style-flex with their co-lead.
- Take the curriculum and modify it as needed while still remaining true to the intended outcome.
- Shift back and forth between teaching and learning effortlessly.
- Adapt their style based on the needs of students and facilitators.
- Oscillate between teaching and facilitation as needed.
- Manage unexpected events that occur and keep their cool under pressure.

Well-Organized

- Know their profession, know higher education, and can pull in ideas from other sources.
- Use what they've learned as a result of their experiences.
- Scaffold students' learning in a way that makes sense.
- Successful at managing details.
- Know and attend to logistics.

- Handle administration to enable larger discussions and dialogue.
- Be students of their environment.

Clarity & Effective Communication

- Have a plan, can take students where they want to go, but aren't directive.
- Remind students where they've been, what they've done, and revisit the goals of the curriculum.
- Help students and facilitators manage expectations in real time.
- Transparent and honest in their communication.
- Echo back what they are seeing and hearing to the students.

Good Course Design

- Pay attention to the curriculum.
- Attend to the priorities set forth and the learning objectives that have been developed.
- Provide suggestions for improvement and offer feedback of what's working.
- Take time to revisit the goals of the program and help students understand what they've done.
- Recognize the value of creating and setting clear expectations.
- Set a strong foundation for learning to occur.

Approachability

- Know students as individuals.
- Make it about the relationship and don't make assumptions.
- Seen as approachable.
- Play a primary role in creating an environment where students can talk openly.
- Have a sense of selflessness.
- Understand that their needs often take a back seat to being present and available.

High Expectations

- Expect change and possibly transformation.
- Desire to create a powerful learning experience.
- Believe that in the possibility of students to impact the world.
- Play a role in identifying students' potential and are focused on moving them to the next level.
- Reconcile and manage their own expectations about the program, students, and facilitators.
- Influence students and facilitators to be better, know more, and change.

These suggestions for practice may offer a significant contribution to lead facilitators and the organizations that manage these long-standing, multi-day, co-curricular, undergraduate

college and university leadership programs. This information could be utilized in selection of lead facilitators by ascertaining to what degree lead facilitator candidates already incorporate these into their teaching and facilitation. A selection of these suggestions could also be used for organizational assessment or self-assessment for teaching performance and provide a more accurate understanding of what facilitators currently do while engaged in instruction.

This information also could be utilized for training lead facilitators. It could be provided in training materials and used to evaluate the lead facilitator's effectiveness. The host organization, the lead facilitator, and/or their co-lead facilitator could use these suggestions for practice to see if, in fact, the instructor displayed or exhibited these characteristics. An instructor might use these suggestions for practice in training to self-assess their own performance and it could help them identify possible gaps and areas for improvement. There is a potential danger if an individual or organization would use this as a mere checklist. It may focus the organization or evaluator too much on these characteristics or behaviors. Without being tested, caution is appropriate before significant or wholesale adoption. Future research is suggested to further verify these suggested for practice.

Implications of the study

The findings in this study have implications for organizations as well as the selection, training, and evaluation of lead facilitators. The following sections are presented below as possible implications and ramifications to the successful outcomes of co-curricular, multi-day, undergraduate college and university leadership programs.

Implications for selection of lead facilitators

One lead facilitator in this study highlighted the importance of knowing more about lead facilitators and the programs involved:

I will say to you thank you for doing this because I think it's important, and I've appreciated your identification of the four institutes that you're looking at; and would hope that the work that you're doing on this would contribute to this greater knowledge of why we're doing what we're doing and try to make some meaning of it. Because I think you started off by saying there's a real void here and I think there is. And I think we think we know what we're doing, but I'm not sure and so maybe this research will give some insight in that. So I'll offer that. (Instructor G)

Additionally, it would be noteworthy to see if further rigor could be applied to the selection of good lead facilitators, rather than just the coordinating individual's judgment. Is there a personality test that lead facilitators could take? Is there a teaching ability scale? If so, on what do good lead facilitators score high or well? A more scholarly or scientific approach to lead facilitator selection may lead to better understanding of criteria about what makes a good lead facilitator and whether those criteria were actually the best criteria to use.

Implications for training of lead facilitators

An aspect outside the focus of this research is whether any training is provided for lead facilitators. How often it occurs, if it does, and in what format was out of the scope of this study. It would be insightful to ask lead facilitators how they were trained. From the nomination criteria, it's clear that each organization expects that lead facilitators already have a good skill set in teaching and facilitation. How did they develop this? Did they have an individual plan to improve (Tucker, 2001)? Based on the interviews, it would seem that many lead facilitators are not provided or are provided limited training in advance. If an organization does provide training, what do they currently do to train or prepare them? What is valued, highlighted, and discussed? How often does this occur and in what frequency? The suggestions for practice provided earlier in this chapter on pages 269 – 277 could be helpful in developing training material for lead facilitators in these programs.

One issue that deserves more attention is how knowledge management is utilized among lead facilitators and within organizations. Based on the interviews conducted in this study it would seem that lead facilitators often only learn, develop, and grow from their experience in an incremental way from co-leading one session per year. Some organizations do connect the leads during the course of that year based on what is working or not working in the curriculum, but this seems not to be focused on improving the existing skills of the lead facilitators overall and at the discretion or motivation of the lead facilitators themselves. The following examples from the transcribed interviews may indicate and emphasize this:

> *Every summer I get out all of the books that we worked through the years before, and take a look at the differences of curriculum. What came before what came after, and if there are some of the same components I like to know why they were moved around. Cause sometimes, and in this case I'll talk to an NIC staff member and say help me understand what didn't work, or what the idea is; so I am conceptually understanding why it was written that way, so that I can be sure to get the point across. Yeah, I think it's important since I didn't write this curriculum that I understand the reasonings behind it, so I can support what the outcomes should be. (Instructor F)*

> *A piece of our prep-work, though as my colleague and I have talked with an NIC staff member has been able to talk through like to verbally have it explained. (Instructor E)*

> *If possible we try to meet ahead of time, like before we arrive onsite, at the very least time, either time on the phone, over Skype, by email, kind of processing through like what did you think of this piece of the curriculum? How you think we could best connect that back to this bigger idea? So to really talk through the logistics of what were doing. (Instructor E)*

With the abundance of technology at the disposal of these organizations, how could it be utilized to better network, share ideas, and/or provide knowledge management for leads so that their learning does not require an incremental, session-to-session, learning curve? How could best practices be immediately available to all leads upon their acceptance of this role? As an example the POD Network – The Professional and Organizational Development Network in Higher Education – provides a free listserv for faculty in higher education regarding teaching

(The Professional and Organizational Development Network in Higher Education, 2012). Could there be something like this among institute lead facilitators?

Because of my involvement with LeaderShape®, I am aware that at least their organization has attempted this. LeaderShape® has informally worked to connect lead facilitators through Facebook groups, online bulletin boards, listservs, and they have posted resources online in a networked lead facilitator area but with limited success and interaction among lead facilitators. Having resources available for continuous improvement can lead to teacher effectiveness (Kemp & O'Keefe, 2003). Do other organizations that manage institutes provide some way of connecting and interaction among lead facilitators outside of their co-leading institutes? Further investigation and research is recommended to understand this in greater detail.

Implications for evaluation of lead facilitators

In the abovementioned expansion of thought and possible suggestions section, lead facilitators mentioned their desire for better feedback and evaluation of their efforts. What is done now? Is it effective? To what degree is the lead facilitator's actions and approach incorporated into the program evaluation? It seems apparent that the role of feedback and evaluation for lead facilitators has significant implications for lead facilitators. Do lead facilitators engage in and/or provide feedback to their co-lead facilitator? If so, in what form? If not, why not? Could a comparison be made of good teachers in institutes with effective teaching instruments? What can be learned from the classroom environment? Certainly there is significant empirical research regarding the scholarship of teaching and learning in higher education (Hutchings, Huber, & Ciccone, 2011). How could these studies and research best inform organizations and lead facilitators in their evaluation? The suggestions for practice

provided earlier in this chapter on pages 269 – 277 could be helpful in developing an organizational or self-assessment for lead facilitators in these programs.

When lead facilitators do engage in reflection and evaluation, it would seem they value this dialogue and learn from doing so:

> *It's interesting how quickly this experience … just doing this today, how it makes me think every lead should have to go through some sort of … this is all reflection stuff that you should … people should do. Because I'm sitting here thinking, whoa, I've never thought of that before, or it's either so ingrained in you that you don't know why, but then you have to think about it and articulate … it's helpful. I mean … it helps you understand yourself better. I think that the lead role for LeaderShape® and I'm sure with I-LEAD®, with UIFI, and Wooden and all of that … would know it is an incredibly amazing opportunity, but is a somewhat of an awesome responsibility that one bites off … and I think a lot of people half-ass it, because they can. Maybe it's the students who don't even know any different, but … there are people who can pull it off half-assed. And that's really unfortunate. What would happen if they would have been at ninety-nine or one-hundred-and-ten or … I mean, it's really interesting. And the power of that. And the significance of that. Yeah. Maybe the follow up phone calls need to really be around, how did you show up to this institute? Not about, here's what the students thought, but how do you think you showed up at the institute? (Instructor B)*

Implications for the organizations

Organizations that host and manage these long standing, co-curricular, multi-day, undergraduate college and university leadership programs play a significant role in their success by how they pair co-lead facilitators together and to which sessions they are assigned. How do they determine the best fit? What process do they use? What role does this pairing play in helping good lead facilitators be good or less effective? Does the diversity of the student population, or lack thereof, of the participants make a difference in what skills are needed by the lead facilitator? Further investigation into the process warrants future research.

Implications for other programs and environments

Findings from this study may have application in other environments as well. For example, there are numerous weeklong leadership training programs in America – corporate and

otherwise. If this study provides insights regarding effective teaching practices in undergraduate, co-curricular leadership programs those findings may help inform practice for other week-long immersion programs.

Suggested future research

The section is divided into three focused areas highlighting potential new areas of research regarding co-curricular, undergraduate leadership education programs. The four sections include the greater need for research about lead facilitators, the greater need for research about the development, progression, and evolution of lead facilitators, and the greater need for research about institutes. Each section includes subsections to provide even greater granularity.

Greater need for research about lead facilitators

Bain (2004b) identified potential candidates (instructors) predominantly through interviews and recommendations from students and professors. Although Bain (2004b) utilized several sources of information over the course of the 15-year study, such as syllabi, assignment sheets, statements of grading policy, lecture notes, observation, student academic work, and colleagues' comments, he ultimately employed formal and informal interviews with instructors themselves as the primary source to identify what the best college professors do. Given that the data in Bain's (2004b) study primarily came from interviews, additional data collection in this study, beyond interviews, such as instructor manuals, materials, and observation, was ruled out so as not to create a perceived evaluation of each of the respective programs or to infringe on intellectual copyright of each program. It was therefore determined that interviews would serve as the primary method of inquiry, like Bain (2004b), in this study as well.

These does lead to a natural question of what light further study and investigation into the differences and similarities of each program's curriculum, instructor manuals, and materials

might shed in this area. Furthermore, and more important to this study, is the additional research about good lead facilitators and what could be learned from their teaching notes, from observation, and from other lead facilitators' or colleagues' comments about their co-lead facilitators who did things particularly well or not well at all.

Bain's (2004b) research included observation, significant student input, and a more robust nomination process to identify good instructors. These three additions to research could be done separately or together to further understand and tease out how others see good lead facilitators. It also would be interesting to survey all lead facilitators who teach in institutes with this study's findings about good teaching in multi-day, co-curricular, undergraduate college and university leadership programs.

Is there a difference between teaching and facilitation? If so, what role or difference does this play in being a good lead facilitator at an institute? Given that there are multiple viewpoints from lead facilitators who were nominated and identified as good for this study, it may be just a simple difference in language. That being said, lead facilitators often preferred specific language to describe what they do. These differences have been described as presenting or performing, facilitation, teaching, and even mentoring. Some leads like lecture, others don't. What is the difference between these? Is there any difference? Does this make a difference in whether a lead facilitator is considered good?

Lead facilitators in this study described their role as an instructor as presenting or performing. One lead stated, "*I'm most effective as a presenter and not necessarily as a facilitator" (Instructor M).* Another lead mentioned, "*There's a level of entertainment that happens. So I potentially entertain (Instructor H)."* That lead facilitator when on to say, "*I prepare very much like I would have for a show … it's well rehearsed and it's practiced*

(Instructor H)." Lastly, when talking about their performance, one lead facilitator mentioned, "*I just … have command of the room. I can annunciate; I can project my voice. I can … own the space (Instructor O)."*

Some lead facilitators preferred to describe their role as a facilitator versus other terms. A lead facilitator stated, "*I don't see myself as a teacher. I guess I identify more with being a facilitator because I feel like that that's more of a conversation (Instructor J)."* Another lead facilitator explained, "*I probably fall pretty extremely on the end of facilitator. I really struggle with teaching through talking a lot or lecturing (Instructor N)."* A lead facilitator mentioned, "*I would say my primary teaching methods are facilitated dialogue and engagement (Instructor D)."* Lastly, an additional lead facilitator said, "*It's funny you use the word teaching. I see myself more as a facilitator. Facilitators hold space and create space and the wisdom in the room is already there (Instructor A)."*

Other lead facilitators were more comfortable describing their role as a teacher. As an example, one lead facilitator stated, "*Well it really is teaching isn't it? But I think it mostly is referred to as facilitation (Instructor G)."* That lead facilitator went on to say "*I try to present the information in a clear and concise logical manner that students can make sense of it and take the material, and use it somehow, however that might be. So, when I teach I first make certain that I understand the material, and then I try to get the information out there the best I can so that they have an understanding of what it is and why we're talking about it (Instructor G)."*

Lastly, other lead facilitators preferred to describe their instruction in other terms different from presenting, facilitation, or teaching. As an example, one lead facilitator stated "*Ideally I think I would want to describe it as … maybe as mentor. I don't like the word,*

personal teacher because I think teaching implies credentials; and so I see myself as somebody that they can maybe learn something from and I would use the word mentor (Instructor I).”

Do the philosophies or approaches of presenting, facilitation, or teaching impact how good a lead facilitator is? Are these simply nuances or do they impact the student and program evaluations? How do lead facilitators in these programs compare with how instructors inside the classroom approach teaching? Are their teaching philosophies similar or different? The role of mentoring was introduced from instructor to student in the abovementioned passage, but what role does mentoring play between and among co-leads before, during, after sessions?

Do good leads have a common background? Or come from particular fields? Does this make them strong or stronger facilitators? In this study, the 15 lead facilitators broke down into the following current employment categories: seven work in higher education, five work in non-profit organizations/associations, one as a stay at-home mom, one in for-profit corporations, and one as a consultant. If you exclude these individuals from the original pool nominated by the four organizations to potentially participate in this study, the remaining group of nominated individual’s current employment broke down into the following categories: 30 work in higher education, 10 work in non-profit organizations/associations, three in for-profit corporations, three as a consultant, one in the military, and one in government. How do good leads use their background and previous experiences to inform their facilitation?

Lastly, a unique aspect of the majority of individuals who participated in this study was their experience with the organization beyond just facilitating the program. Seven of 10 have coordinated at least one national or campus-based institute, five of 10 individuals have been or currently are employed by the organization, five of 10 have written some curriculum for the program, four of 10 have managed the institute on a national level, three of 10 have served as

volunteers for the organization, and two of 10 have served in a board capacity for the organization. Each of these roles was in addition to their role as lead facilitator. Was it experience with the organization or above average relationships with the people in the organization that had them be identified as a good lead facilitator? Which came first? Does knowledge of the organization help you be a better lead facilitator?

Greater need for research about the development, progression, and evolution of lead facilitators

While lead facilitators included their institute-specific experience as a part of helping to develop them as a good lead facilitator, what other teaching and facilitation experiences did they have outside of this immersion environment that helped them to develop into a good lead facilitator? Each of them came up through experiences and practice and have been recognized as having the skills and confidence to work with large group, institute-wide facilitation – how do they feel they've grown? What did they do to grow? It would be interesting to have lead facilitators explain their own facilitator journey. How did you as a lead facilitator evolve? What's the next step for your own evolution? What are leads like when they first start and aren't good? What are leads like that have been leading for a while but aren't identified as good?

What motivates lead facilitators to participate in these programs? The lead facilitators in this study brought up this topic. Why do they do it? Why do they persist? What keeps them coming back? What are the rewards for doing this? It would seem that there potentially are several personal benefits they receive as lead facilitators – what are they? While the lead facilitators in this study have been described as moving toward being selfless, is this true? Are lead facilitators compensated? If so, how? If they are compensated, does this compensation play

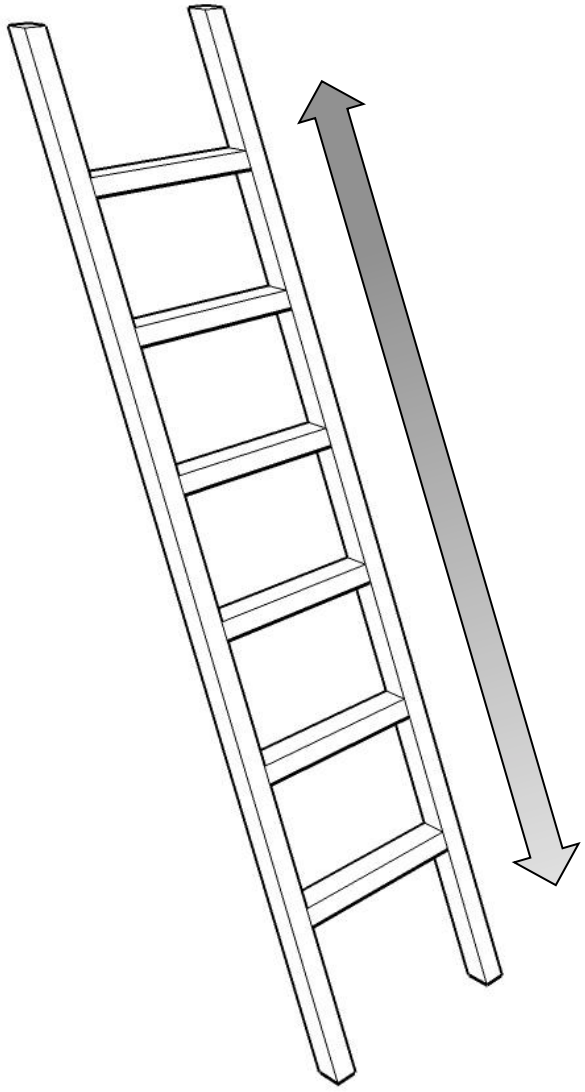
a role in their facilitation or longevity with the organization or program? It is possible that lead facilitators may be a lot less selfless than portrayed in this study.

Does gender play any role in how lead facilitators are identified or described as good? In this study, of the 15 participants, eight were male and seven were female. Are there any gender implications in co-lead pairings? Does this play a role in student evaluations and perceptions of good lead facilitators? Because Beta Theta Pi is a single-sex college men's fraternity, all of the undergraduate participants in the Wooden Institute, one of the programs in this study, are male. Does this have any implications for lead facilitators? What role does social identity play in good facilitation for good lead facilitators?

During the course of this study and the interviews with good lead facilitators, an emerging theme was repeatedly present from the lead facilitators – they do things differently now than when they first started as a co-lead. In short, they evolve over time. Lead facilitators did not do that overnight. It developed over time. Good lead facilitators figure out what matters most and don't get wrapped up in the things they used to; they mature into the role of a good lead facilitator. This is very useful information for both lead facilitators and the organizations that manage institute programs. The framework (Figure 2 below) may suggest that there are stages, but it emerged that lead facilitators develop over time and the framework below shows how they changed. This framework was shared with each of the participants in my follow up interview who verified and confirmed its accuracy regarding each of their personal experiences, thus elevating this framework as representative, credible, and trustworthy (J. L. Arminio & Hultgren, 2002; Creswell, 2009; Kvale, 2007; Kvale & Brinkmann, 2009; Patton, 2002).

Figure 2

Emergent framework: Good lead facilitators evolve over time



More experienced lead facilitators

Greater focus on:

- Student performance: Did students move further down a continuum?
- Approach: Being vs. doing
- Success: More dependent on how students choose to show up or contribute
- Affirmation: Am I authentic?
- Lead facilitator: Greater confidence and higher self-esteem
- Questions: Come from life/life experience
- Curriculum: Delivery in spirit
- Technology/visuals: Serve as aids
- Details and logistics: Only the essential

Less experienced lead facilitators

Greater focus on:

- Personal performance: Did students "get it" (finite/fixed point) or not?
- Approach: Doing vs. being
- Affirmation: Am I measuring up?
- Success: Less dependent on how students choose to show up or contribute
- Lead facilitator: Lesser confidence and lower self-esteem
- Questions: Come from the facilitator manual
- Curriculum: Delivery as written
- Technology/visuals: Serve as critical
- Details and logistics: Overly concerned

It is important from the outset to understand this framework does not set up a bad versus good lead facilitator delineation, rather it describes how good lead facilitators sharpen their focus as they have more experience. This evolution is a gradual shift that occurs over time mirroring the amount of experience co-leading in an institute environment and the evolution profiles where

good lead facilitators spend more of their time as they have more confidence and expertise. As their self-esteem and confidence increase, it becomes less about them and more about the students participating in the program. While there is often a decrease in ego, it's not accurate to say they become a martyr, although there are indications that they do become more selfless over the course of their evolution.

Newer lead facilitators often focus more on the things they can control. They have a lower level of efficacy and self-actualization in regard to the co-lead role. Whereas, veteran lead facilitators have more institute experience to draw upon, have a higher level of efficacy, and are more self-actualized. More experienced lead facilitators seemingly are more often willing to wade into spaces and conversations where they have less control. With experience and over time competence grows from novice to expert.

Additionally, it is important to note that a good lead facilitator may style-flex back and forth along this continuum based on the strengths and skill set of a co-lead facilitator. Furthermore, based on this framework, if a lead facilitator were to become a new lead facilitator in a different institute program, they would often be more focused on the areas with higher control first before evolving to a more self-actualized state. While it was not distinguished among lead facilitators in this study, it is critical to denote that this also is not a depiction of preferences or styles versus traits, such as introverted versus extroverted lead facilitators. Based on interviews with good lead facilitators in this study, some of the more veteran lead facilitators would describe themselves as introverts and others would describe themselves as extroverts.

Summary of emergent framework: Good lead facilitators evolve over time

Experienced good lead facilitators better prioritize what preparation they need and must do in advance to be fully present in the conversation and at the institute. They know that greater

mastery of content facilitates a higher level of being in the moment with students and facilitators. More experienced good lead facilitators may have a plotted course in mind, but don't force it. They know that their success often relies on where the group is and they understand it's important to make sure everyone is with them on this journey. Experienced good lead facilitators have found a balance of it being about them and not about them at all. They have a greater understanding that there may not an "end point" for all individuals to arrive and get to, but that where individuals and the group goes is often dependent upon how students show up and choose to be present in the conversation. More experienced good lead facilitators have found or developed their own teaching and facilitation style based on what works and best fits them. They have stopped obsessing and constantly comparing themselves to other lead facilitators. Experienced good lead facilitators have improved confidence, efficacy, self-esteem, and are more self-actualized. They are comfortable in their own skin and show up as authentic. More experienced good lead facilitators have a greater focus on bigger picture issues and are less focused on details and logistics. While they fully acknowledge that both details and logistics matter, they often have managed them to a level that enables them to be in conversations with students that they believe matter more. Experienced good lead facilitators are able to do more things at once and can do them better than when they began co-leading institutes. They are able to combine all of their skills and balance what is needed for students, facilitators, and the session environment. More experienced good lead facilitators underscore the value of experience. They know that experience matters and often there is no substitute for it.

To showcase this evolution of lead facilitators, the following descriptions are provided from the transcribed interviews to provide more clarity and context to this framework:

> *After having done a number of institutes my strategy had probably changed. In the beginning there was probably little preparation that went into aside from reviewing the*

curriculum. Now, if I were to lead/facilitate a session I would always start with the curriculum and familiarize myself with the learning outcomes of the program. What the activities were, what we need to get out of those, what the, what the 'ah ha' moments need to be in each of those specific curriculum elements. (Instructor I)

My answer's different today than it would have been when I first started doing UIFIs. When I first started doing them, I would have thought that they would have walked away thinking it was a life changing experience. I don't think that anymore. What I think these days, is if they've walked away having had all this information and then they can try and one piece of the information and one piece fits or they can use one piece, then we've been successful. I've learned that it's not tied up in me. When I first started it became more about me. What kind of feedback was I getting; what was I hearing from students after? Were they telling me I was doing great things; that is so about me at that point. It's so about them, and I'm at the point now where and I think that that is tied up a little bit in confidence issues as a lead facilitator, right? I think the more confident I became in the delivery of the curriculum the more I was: I know I'm doing the best I can do and I know I'm giving them what they need and if they're not reacting, that's their issue. These days I think if you find something in this curriculum and you try it on for size and fits, great. And you can use it, great. (Instructor G)

I've evolved over time or early on in my first year doing an Institute like this. It was … oh, I want to do it like so and so, and … I've had some great role models in the industry, not only with our organization but in the leadership in the fraternal and sorority world, but at the end of the day I've been able to be most effective when I can ask myself that questions of … what would I do, while also picking up and utilizing other things that I've seen working, too. (Instructor M)

The early facilitator in me cared deeply about a good evaluation. Success was often measured in 'they had a really good time.' I have progressed more into being able to move a group from point A to point Z via each of the B, C, D, etc., but doing that intentionally for each of the participants. I can successfully manage the hundred or so participants … and I would place facilitators into that participant category … better now than I was twenty years ago: based on being able to read where they're at; using downtime to complement curriculum; to be intentional about examples that I use that will hit more in a group; being able to even within sections of a session, use multiple teaching styles to hit the learning dynamic … I manage a group's emotional process better than I used to … given a group's propensity to reach highs and lows, as to having those even out a little bit more, but not ignoring the learning that happens in that moment. I'm able to identify for a group that this is your learning moment. That your discomfort is coming from that learning versus letting them off that hook or telling them that this … that they can let go of that discomfort. 'No,' I say, 'you have to own it and decide what it means for you.' (Instructor H)

I would underscore, having tried to have observed as best I can my own style, and sensing reactions or feedback, that's come over a number of years, as well as having observed others in co-lead situations, I think one can't underestimate the importance of

> *experience … those leads who have been the best have been those who have had to navigate large group facilitation before. Someone who can, at the ready, recall content, or examples, and have enough confidence in their own, not that they have to have the answer for everything, but that they are experienced enough in knowing how to facilitate an issue, however it may be posed, in satisfactory or exemplary terms. That experience is critically important. That's not to say that someone right out of college can't be a co-lead. Because they surely can; but what were their experiences prior to that that probably caused them to be a good lead, right? I think that experience is important, whether it's their own personal or professional experience. (Instructor L)*

Good lead facilitators don't just happen. They practice. They also draw on other teaching and facilitation experiences outside of an institute context and often approach their day-to-day work as teaching. As they teach, co-lead, and facilitate, they become more comfortable in who they are as a person. Of course, this does not happen in a vacuum. They grow, mature, and develop and are able to draw on their experiences in life to improve their facilitation and teaching.

Good lead facilitators often recognize that their approach as a co-lead now has to change. They move from a place where the lead facilitator makes it about the self to a place where the facilitator becomes more selfless. Good leads are committed to evolving their skill set and facilitation over time. They engage in a continuous improvement process over their life span as a lead facilitator.

During the analysis of my results, findings, and framework, I gravitated to the literature regarding how individuals acquire and learn new skills when thinking about how lead facilitators evolve and become good. While the framework is still in an early stage of development, there are some similarities of how good leads described their evolution over the course of time with some findings about how skill development occurs. Below, three frameworks are presented for possible suggestions and connections to how lead facilitators evolve over time. Additional research is recommended to see if these models and frameworks would apply in how good lead

facilitators in co-curricular, multi-day, undergraduate college and university leadership programs, particularly in regard to the stages or levels (if this actually does occur) in the evolution over time of lead facilitators.

First, Noel Burch, an employee from Gordon Training International, developed the “Four Stages for Learning Any New Skill” theory in the 1970s (Adams, 2012). The four stages of competence, or the "conscious competence" learning model, progresses from incompetence to competence in a skill development in the order of: unconscious incompetence, conscious incompetence, conscious competence, to unconscious competence (Adams, 2012). The highest level of unconscious competence occurs when an individual has had so much practice with a skill that it has become "second nature", or unconscious, and can be performed easily. As a result, the skill can be performed while executing another task. The individual may be able to teach it to others, depending upon how and when it was learned, although there is some discussion that after a period of time of being unconsciously competent, individuals might actually have difficulty in explaining exactly how they do what they do because the skill has become so instinctual (Adams, 2012).

Some individuals have expanded upon Burch’s model to include a fifth stage, but the potential additions to Burch’s model vary between authors. Some refer to reflective ability, or "conscious competence of unconscious competence", as being the fifth stage (Jones, Jenkin, & Dale, 2006), while others use the fifth stage to indicate complacency (Ruona & Gilley, 2009).

This idea of complacency is intriguing. In this study, one participant was identified as a potential outlier derived from their responses to questions and a slightly decreased level of passion. The individual spoke about whether or not the time away from friends, family, and work was ultimately worth it. Two other individuals mentioned this but didn’t exhibit the

outlier's same level of detachment, but the other two lead's comments could be precursors based on life experience, age, number of sessions led, and a possible life cycle of being a lead facilitator.

The possible outlier also seemed more removed about their commitment to the long-term connection with students. The external auditor involved with this study stated:

> *One of the things to observe with Instructor B is that he's kind of an outlier. His approach is student centered but more of the tough love that you don't get from the other leads. He doesn't have the time or patience for students who don't get it or choose to not engage whereas some others view that as their greatest challenge and opportunity.*

As one example of this in their interview, the possible outlier stated:

> *With students, I am invested in their success. I'm not necessarily invested in having sixty new best friends at the end of the institute. I'm just not. I connect with three or four students usually every time in a way that, I will be Facebook friends with them or whatever, but … on the anniversary of last year's institute … like this year I will delete all of my friends from last year because I have a whole sixty new ones at the end of the this year's session and so when I'm in there next year I'll just delete those. It's not because I don't like them or don't want to follow them, but it's like I probably have five or six from each institute that are probably still on my friend list. Even twenty … fifteen years ago. I have a lot of small group facilitators though too, because I'm like, I'll never see you again (Laughter). It's not that I don't care about you. I hope you have a great life and I'm sure you're going to do great things, but I don't need more friends. It sounds awful, but it's just real. (Instructor B)*

It would seem that one individual, and potentially three, seemed to be transitioning to a new phase. What phase this might be and if this is a next phase is still unclear, but exploring this could warrant future research.

Second, another possible progressive staged level model are Dreyfus & Dreyfus' (1980) five stages of mental activity in skill acquisition. This model has five skill levels moving from novice, competent, proficient, expert, and finally master (Dreyfus & Dreyfus, 1980). The final level of master describes an individual's skill level or mental function in the following four ways: (1) recollection: situational, (2) recognition: holistic, (3) decision: intuitive, and (4)

awareness: absorbed. Dreyfus & Dreyfus (1980) state that this level of mastery "only takes place when the expert, who no longer needs principles, can cease to pay conscious attention to his performance and can let all the mental energy previously used in monitoring his performance go into producing almost instantaneously the appropriate perspective and its associated action" (p. 14).

Lastly, empirical research has shown a framework of how people learn and develop expertise. Experts differ from novices in several key ways, which has implications for learning and instruction (Brandsford, Brown, & Cocking, 2000).

- Experts notice features and meaningful patterns of information that are not noticed by novices
- Experts have acquired a great deal of content knowledge that is organized in ways that reflect a deep understanding of their subject matter
- Experts' knowledge cannot be reduced to sets of isolated facts or propositions but, instead, reflects contexts of applicability: that is the knowledge is "conditioned" on a set of circumstances
- Experts are able to flexibly retrieve important aspects of their knowledge with little intentional effort
- Though experts know their disciplines throughout, this does not guarantee that they are able to teach others
- Experts have varying levels of flexibility in their approach to new situations (p. 31)

Of particular interest is the statement "Though experts know their disciplines throughout, this does not guarantee that they are able to teach others" (Brandsford et al., 2000, p. 31). It is likely that many of us understand this from personal experience; knowledge of a subject does not necessarily equal the ability to teach it (Cranton, 2002).

These three abovementioned possible staged level frameworks could provide further insights as to whether lead facilitators progress through a tiered evolution with multiple stages. This is important research and could provide a greater understanding about lead facilitators in co-curricular, multi-day, undergraduate college and university leadership programs, particularly because it seems to still be unclear as to how best train them, select them, and evaluate them.

Greater need for research about institutes

While this research involved looking at the longest standing, co-curricular, multi-day, undergraduate college and university leadership programs, the body of research about these programs is limited. Of the studies that have been conducted, it's clear that these programs are impactful. These programs also are similar in their format, nature, length, and design.

The lead facilitators who have been identified as good and participated in this study believe strongly in these programs. One of the more experienced good instructors went so far as to call institutes a best practice:

> *I am a strong proponent of intensive, focused, learning experience … that it is in those four, five, six day concentrated, focused, learning opportunities with a community of folks where we're engaged … where there is time online and time offline that deep learning happens and transformational learning happens and … not the only, but a best practice, absolutely. (Instructor D)*

This research specifically looked at what good lead facilitators do in these institute programs. As such, there is a particular interest in the intersection of the people and the curriculum. Which is more important? Is it the curriculum or the people involved that makes these programs successful? As previously mentioned in chapter three, Dr. Dennis Roberts, Dr. Laura Osteen, and I spoke about what LeaderShape® has found to be critical in its success in a presentation at the International Leadership Association's annual conference. At the time of LeaderShape®'s 20th year, we considered best practices to include such factors as curriculum, training, environment, people, selection, quality, time, execution, assessment, capacity building, and the compounding effect of each of these best practices (McRee et al., 2005, 2006). While we believe all of these factors are vital for a successful institute programs, two of the 11 best practices specifically name the curriculum and the people involved.

This discussion and debate of which is more important – the curriculum or the people who are the instructors – also takes place even among the good lead facilitators involved in this study. This interplay between the curriculum and the facilitation of the curriculum could benefit from future research to help tease out potential differences and the important factors of each. As an example of the impact of curriculum, each institute has program outcomes and objectives. Do the outcomes of the program happen to leads as a result of their teaching and facilitation? Do these occur for the small group facilitators? Or are they only written and designed to impact students? More research is recommended on this potential difference and the importance of both the curriculum and the role that instructors play in facilitating these institutes. While it seems clear that these programs are having some level of impact, more research should be conducted about what specifically makes these programs good or effective.

Conclusion

Throughout the course of this journey, I was immersed in the possibilities and understanding of what good teachers do in long-standing, multi-day, co-curricular, undergraduate college and university leadership programs. The literature served as my starting point and this progressed to discourse and dialogue with 15 other individuals who were identified as good lead facilitators. Their co-investigation, along with the support, help, and guidance that the organizations affiliated with managing these programs provided, led to several findings. It is my hope that the descriptions forwarded shed light on what good instructors do in these programs. Additionally, the framework, suggestions, recommendations and implications all provide a catalyst for the improvement and development of more good lead facilitators and their respective institutes.

A limitation of this research study could be that good teachers were selected on the word of the organizations that provide their respective programs. As a result there was little control over how the population was identified and the composition relies exclusively on the skill of the individual from each nominating organization. Sampling bias was a potential concern because the potential subjects identified may tend to nominate people they know well, thus providing subjects that have the same traits and characteristics and may not be a true representation of the entire available population. To help mitigate this potential limitation, the primary individual managing each respective program was utilized to identify potential good teacher subjects since they are closest to the selection, management, and evaluation of each lead facilitator.

The strength of this study is grounded in good research design. It is recommended that qualitative researchers employ at least two of his eight verification procedures in any given study. I employ seven of the eight recommended techniques including prolonged engagement and persistent observation, triangulation, peer review or debriefing, clarifying researcher bias, member checks, rich and thick description, and external audits. To ensure qualitative goodness and reliability are achieved I employed multiple procedures. To achieve reliability, I checked the transcripts so that no mistakes were made and verified each interview with each participant (member-checking), used constant comparative analysis in coding, and used intercoder agreement (cross-checking) with the external peer auditor to determine consistency. To achieve goodness, I used triangulation, member-checking, and rich, thick description, presented researcher bias, engaged in self-reflection, provided negative or discrepant information that runs counter to the themes developed when appropriate, spent prolonged time studying the phenomenon, used peer debriefing for accuracy, and an expert audit review for verification of the findings.

As a researcher, I come to this study after having worked for two of the organizations included and having served as a lead facilitator 28 times for two of the programs studied as I mentioned in chapter three in the self as instrument section. As I reflect on this process and study I am somewhat overwhelmed with the need to focus on 27 key aspects of being a good lead facilitator in these programs. How does one attempt to think about all of these aspects while attempting to be fully present with the students and material being asked to deliver? I can only imagine that with continual practice and improvement that some of these characteristics and behaviors become second nature so that there is a level of unconscious competence while teaching.

Of the 27 codes that emerged from the participant interviews, I feel that the most important ones are care and compassion, personal disclosure/vulnerability, authenticity, managing diversity, and energy. Before beginning this study I would have said that if a facilitator just cares – cares about the students and their own performance – then they would embark on a personal journey of continuous improvement ultimately resulting in becoming a good lead facilitator. I now believe the process of becoming and being a good lead facilitator is much more sophisticated than this simplistic explanation. While it is important to care, as shown by interviewing students and facilitators, this must be felt at a level that students internalize and get at a deep level. This takes time and practice to be genuinely delivered.

Due to the immersive nature of these programs, I believe personal disclosure and vulnerability are paramount. You are with students and fellow facilitators at all times – from early in the morning to very late at night. The setting and environment of these week-long programs requires lead facilitators to "go there" with the students and not create a hierarchy of teacher versus student, but rather to walk alongside students in this journey. In order to do this, I

believe good lead facilitators must share at a very personal level their own struggles and successes and in doing so, it creates space for others to take risks and have a transformational experience.

Several lead facilitators spoke about the need to be authentic and to find their own voice. Good lead facilitators ranged widely from individuals who focused on facilitation more while others thought of themselves more as a presenter. It is not about trying to be like someone else you admire or another facilitator that has a different style, rather, it is imperative that a good lead facilitator find their own voice and approach that resonates and speaks to them individually. In doing so, this allows good lead facilitators to show up as authentic. This authenticity is key to being an effective teacher, but particularly in these institute settings.

Managing diversity is really about creating a learning sanctuary that respects and is available to all people. We live in an increasingly global, diverse, and rich combination of cultures. Individuals deserve the right to be in an environment that allows him or her to be their best selves. Helping individuals have an appreciation for and a desire to include all voices at the table is important to practice so that institutes create leaders that can be successful in the world. Good lead facilitators hold the space to allow all others to explore their values, beliefs, and passions without judgment.

Lastly, I believe that energy is important in an institute setting. The days are long and there are few times where a lead facilitator has time alone to recharge. The nature of this type of teaching requires a good lead facilitator to role model good energy throughout the program. Students and other facilitators still look to the individual in front of the room to set the tone. At times, all of our energy wanes, but a good lead facilitator has taken care of themselves and others

so that they can continue their own journey of learning and have enough left over to support others in doing so as well.

Final thoughts

As we look toward the future of the role of good lead facilitators and what they do and the possibilities of their work in multi-day, co-curricular, undergraduate college and university leadership programs, I am able to reflect back on my own journey of this research and appreciate that there are many great individuals involved in this work that believe passionately in students, the programs, and their own impact. As one lead facilitator stated:

> *I have been really excited because you've been asking questions that I don't think about. And I always want to be a better facilitator, and I want to be a better advisor, and I want to be a better CEO. You've been asking questions that are thought provoking for me, and so I think sometimes when I say that I mean I'm really glad you asked it from me because now I'm going to think about how I can be better, how I can be more deliberate in what I do. And how I can be more deliberate in my expectations for facilitators; because I don't want to get stuck in, this is my eighth year, so this is what we do. I always take notes and I always learn from everyone around me and so I'm learning from some of your questions right now, of how I can increase the overall experience for myself and for others too. (Instructor F)*

I look forward to the continued dialogue, discourse, assessment, and evaluation of how best to provide transformational leadership experiences to undergraduates in higher education. Together forward.

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Appendix A

Summary of characteristics of effective instructors in the classroom

Porter's characteristics:

- Clear about their instructional goals.
- Knowledgeable about their content and the strategies for teaching it.
- Communicate to their students what is expected of them – and why.
- Make expert use of existing teaching materials in order to devote more time to practices that enrich and clarify the content.
- Knowledgeable about their students, adapting teaching to their needs and anticipating misconceptions in their existing knowledge.
- Teach students ′meta-cognitive strategies′ and give them opportunities to master them.
- Address higher as well as lower level cognitive objectives.
- Monitor students′ understanding by offering regular, appropriate feedback.
- Integrate their teaching with that in other subject areas.
- Accept responsibility for student outcomes.
- Thoughtful and reflective about their practice (Porter & Brophy, 1988).

Cashin's characteristics:

- Mastery of subject matter
- Appropriate curriculum development.
- Good course design.
- Expert delivery of instruction.
- Appropriate assessments of learning.
- Availability for students.
- Timely completion of administrative requirements (book orders, syllabi on file, grade reports, etc.) (Cashin, 1989).

Feldman's characteristics:

- Organization and preparation.
- Being clear and understandable.
- Availability and helpfulness to students.
- Sensitive to class level and progress.
- Openness to class discussion and opinions of others.
- Enthusiasm about teaching and subject.
- Knowledge of subject.
- Fairness and impartiality in evaluation of students.
- Concern and respect for students (Feldman, 1989a, 1989b).

Carson's characteristics:

- Link students to their discipline.

- Use stories, examples, anecdotes to explain tough concepts.
- Truly care about their students and their learning (Carson, 1996).

Hativa's characteristics:

- Organization and preparation.
- Provides clear and interesting/engaging lessons.
- Promotes a climate of learning.
- Earnestly promotes students′ learning.
- Enjoys teaching and enthusiastic about subject.
- Shows care and concern for students.
- Provides regular feedback to students (Hativa et al., 2001).

Silvestri's characteristics:

- Love for teaching and learning.
- Respect for students.
- Student-centered philosophy of teaching and learning.
- Motivation to teach and inspire learning.
- Knowledge of and passion for subject area.
- Organization and preparation.
- Utilizing of role models and mentors.
- Past related teaching experiences.
- Continuous improvement of course and instruction.
- Strong work ethic (Silvestri, 2005).

Baslow's characteristics:

- Dynamism/enthusiasm.
- Instructor-individual student interaction.
- Instructor-group interaction.
- Organization/clarity.
- Scholarship/knowledge (Baslow et al., 2006).

Sorcinelli's characteristics (first developed by Chickering and Gamson):

- Good practice encourages student-faculty contact.
- Good practice encourages cooperation among students.
- Good practice encourages active learning.
- Good practice gives prompt feedback.
- Good practice emphasizes time on task.
- Good practice communicates high expectations.
- Good practice respects diverse talents and ways of learning.

Angelo's characteristics:

- Active learning is more effective than passive learning.
- Learning requires focused attention and awareness of the importance of what is to be learned.
- Learning is more effective and efficient when learners have explicit, reasonable, positive goals, and when their goals fit well with the teacher's goals.
- To be remembered, new information must be meaningfully connected to prior knowledge, and it must first be remembered in order to be learned.
- Unlearning what is already known is often more difficult than learning new information.
- Information organized in personally meaningful ways is more likely to be retained, learned, and used.
- Learners need feedback on their learning, early and often, to learn well; to become independent, they need to learn how to give themselves feedback.
- The ways in which learners are assessed and evaluated powerfully affect the ways they study and learn.
- Mastering a skill or body of knowledge takes great amounts of time and effort.
- Learning to transfer, to apply previous knowledge and skills to new contexts, requires a great deal of practice.
- High expectations encourage high achievement.
- To be most effective, teachers need to balance levels of intellectual challenge and instructional support (Angelo, 1993).

Appendix B

Subject recruiting email

Dear _____,

Hello and greetings to you. I hope this finds you well.

My name is Michael McRee and I am doctoral candidate at the University of Illinois in Human Resource Education. I am writing to invite you to participate in my dissertation research. The purpose of this research is to identify instructor perceptions of good teaching in long-standing, co-curricular, multi-day, undergraduate leadership programs.

I received your name because you were nominated by _____ as someone who has been a good instructor for _____.

Would you be willing to participate in my research study?

Your involvement would include an initial interview (in person, on the phone, or over Skype) and may involve a follow up interview as well.

If you are willing and interested, I would appreciate including you in my interviews.

I would be happy to answer any questions you may have. Please contact me directly be responding to this email or calling me directly on my cell phone at 217.377.6623.

I look forward to hearing from you.

Sincerely,

Michael A. McRee
Ph.D. Candidate
University of Illinois

Appendix C

Participant data and demographics form

Name:

Title:

Organization/Institution:

Mailing Address:

Phone:

Email:

Gender:

Age:

Ethnicity:

Program(s) Attended As A ***Participant*** (Co-Curricular, Multi-day, Undergraduate, College/University Leadership Programs):

- _____ LeaderShape®: The LeaderShape® Institute
- _____ North-American Interfraternity Conference: Undergraduate Interfraternity Institute (UIFI)
- _____ Association of College Unions International: I-LEAD® program
- _____ Beta Theta Pi Fraternity: John and Nellie Wooden Institute for Men of Principle
- _____ Other: _____
  _____
  _____
  _____

Program(s) Facilitated As A ***Small Group Facilitator*** (Co-Curricular, Multi-day, Undergraduate, College/University Leadership Programs):

- _____ LeaderShape®: The LeaderShape® Institute
- _____ North-American Interfraternity Conference: Undergraduate Interfraternity Institute (UIFI)
- _____ Association of College Unions International: I-LEAD® program
- _____ Beta Theta Pi Fraternity: John and Nellie Wooden Institute for Men of Principle
- _____ Other: _____
  _____
  _____

_____

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- _____ Beta Theta Pi Fraternity: John and Nellie Wooden Institute for Men of Principle
- _____ Other: _____
  _____
  _____
  _____

Program(s) Facilitated As A ***Lead Facilitator*** (Co-Curricular, Multi-day, Undergraduate, College/University Leadership Programs):

- _____ LeaderShape®: The LeaderShape® Institute
- _____ North-American Interfraternity Conference: Undergraduate Interfraternity Institute (UIFI)
- _____ Association of College Unions International: I-LEAD® program
- _____ Beta Theta Pi Fraternity: John and Nellie Wooden Institute for Men of Principle
- _____ Other: _____
  _____
  _____
  _____

Number of Program(s) Facilitated As a ***Lead Facilitator*** (Co-Curricular, Multi-day, Undergraduate, College/University Leadership Programs):

- _____ LeaderShape®: The LeaderShape® Institute
- _____ North-American Interfraternity Conference: Undergraduate Interfraternity Institute (UIFI)
- _____ Association of College Unions International: I-LEAD® program
- _____ Beta Theta Pi Fraternity: John and Nellie Wooden Institute for Men of Principle
- _____ Other: _____
  _____
  _____
  _____

Appendix D

Initial semi-structured interview guide

Interview One Schedule

Introduction/Interview One Protocol:

- Welcome the participant.
- Introduce myself and the purpose of the research study.
- Explain the interview process.
  - The conversation will be kept confidential.
  - Although I am digitally recording, your individual identity will be kept confidential if you wish to do so.
  - You will be provided with an executive summary in order to make additions, clarifications, or edits to our interview.
  - I will be taking notes during the process to assist in the data analysis process.
- Review and have the participant sign the informed consent form.
- Complete participant data form
- Clarify and review if the participant has any questions.
- Begin interview.

Semi-Structured Interview
Possible Questions (Probe for details throughout):

Introduction/Warm Up

1. Please tell me a little about yourself.
2. Can you describe a great learning or teaching experience you have had?

Preparation

3. **How do you prepare to teach?**
   Possible probes
   a. What questions do you ask yourself as you prepare for the institute or any other learning experience for students?
   b. Do you make any promises to participants when you are teaching? What promises do you make? Do you have any goals that you are wanting to achieve?
4. What will they be able to do intellectually, physically, or emotionally as a result of being with you?
   Possible probes
   a. What do you expect of their learning if you are to regard it as successful?

Teaching

7. **You've identified as a good instructor. What do you do that makes you a good instructor?**
8. **What do you do when you teach?**

Possible probes

b. What are you primary teaching methods?

9. What is important to do at the beginning of a session?

10. What do you feel is important to do when you co-teach with someone?

Possible probes

c. Are there any good metaphors for your approach to teaching?

11. What do you do that is intended to help and encourage students to learn?

Possible probes

d. What do you want to persuade your students to believe?
e. Or question?
f. Or do you want them to develop new appetites or dispositions?
g. What big questions will the institute and your teaching help students answer?
h. What intellectual skills, abilities, or qualities will it help students develop? How do you encourage participants' interest in these?

12. What is important to do during the middle of a session?

Students

13. How would you describe your relationship with students?

Possible probes

i. What kinds of things do you like most about the students you have taught?
j. What have you liked least?
k. Where will they encounter their greatest difficulties of either understanding or motivation?

14. How do you create a safe environment in which students can try, fail, receive feedback, and try again?

15. How do you communicate with participants in a way that will keep them thinking?

Possible probes

l. How do you evaluate participants' work?

16. Do you have any learning objectives for participants?

Possible probes

m. How do you foster the achievement of those objectives?
n. What evidence do you have about participants' successes in achieving those objectives?
o. What evidence do you have that your methods contribute significantly to the learning that takes place?

17. What is important to do at the end of a session?

18. Do you do anything differently in an institute environment than in other environments (e.g. classroom, workshops, etc.)?

Conclusion

19. Is there anything else you would like to add?

Possible probes

p. Potentially share what was learned by the interviewer

Possible Prompts:

- Can you tell me more about that particular experience?
- Who or what else was involved in that experience?
- How would you describe what happened?
- Can you give me an example?
- What meaning did you make of that experience?
- How did that event change or shape your understanding of teaching?

Closure

1. Thank the participant and turn off the recorder.
2. Remind them that the transcript will be sent to them by email for their comments, edits, or clarifications.
3. Discuss potential arrangements for additional interview if needed.

Appendix E

Follow-up semi-structured interview guide

Interview Two Schedule

Introduction/Interview Two Protocol:

- Welcome participant back for their second interview.
- Confirm they received the PDF of frequency distribution, coding, findings, and framework and have had a chance to review.
- Remind participant of the interview process.
    - The conversation will be kept confidential.
    - Although I am digitally recording, your individual identity will be kept confidential if you wish to do so.
    - I will be taking notes during the process to assist in the data analysis process.
- Clarify and review if the participant has any questions. Follow up with anything I need more information about.
- Begin interview.

Semi-Structured Interview

Possible Questions (Probe for details throughout):

1. Were there other events or experiences or meanings that come to mind we did not talk about last time? Tell me more about those.
2. After reviewing the proposed framework, what are your thoughts?
3. Do the codes, categories, and themes describe what good lead facilitators do in institutes? Do you agree with the ranking?
4. Do the descriptions of what good lead facilitators do resonate with you? Would you add, delete, or modify anything?
5. With regard to the proposed framework of lead facilitators evolving over time, what are your thoughts about the descriptive statements provided? Which visual model best describes this evolution?
6. What are your thoughts regarding the other important factors found? Would you add, delete, or modify anything?
7. What do you believe is most important regarding teaching at this point?
8. Is there anything else you want to add about teaching or facilitation or your experiences?
9. What question have I not asked that you were expecting or would like to answer?

Conclusion

10. Is there anything else you would like to add?
11. Potentially share what was learned by the interviewer

Possible Prompts:

- Can you tell me more about that particular experience?
- Who or what else was involved in that experience?
- How would you describe what happened?
- Can you give me an example?
- What meaning did you make of that experience?
- How did that event change or shape your understanding of teaching?

Closure

1. Thank the participant and turn off the recorder.

Appendix F

External auditor verification letter

THE UNIVERSITY OF MEMPHIS®

Student Affairs Learning and Assessment
800 Wilder Tower
Memphis, Tennessee 38152
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September 21, 2012

Dr. John Ory
Professor
Education Policy, Organization and Leadership
University of Illinois
351 Education Building
1310 South 6th Street, MC-708
Champaign, IL 61820

Dr. Ory,

I am writing to document the process I used as an external auditor for Mr. Michael McRee's dissertation. As someone who has done qualitative research, including a dissertation, I understood what Michael asked me to do and developed a protocol that would allow me to review his findings in an objective and impartial manner.

First, it is important to identify my own limitations in this process: I am familiar with all four of the programs from which he pulled his facilitators and knew many of his participants. I also have a background in lead facilitation for leadership programs. I am a student affairs professional with 16 years of experience.

The following process is what I used for my review.

Timeframe: I conducted my review in one week in order to fully immerse myself in Michael's work. This allowed me to identify consistent themes or areas in which I thought Michael should address his identification of themes.

Order of review: Because I am familiar with the programs, I determined an intentional review of the interviews. I went from the experiences that I perceive likely have lead facilitators with the least amount of experience to those that have the most. Therefore, I reviewed Beta Theta Pi first, followed by I-LEAD®, then the Undergraduate Interfraternity Institute, and finally LeaderShape®. To be clear, I believe that the first three institutes likely have lead facilitators with anywhere from three to eight years of institute facilitation experience. For LeaderShape®, I believe these facilitators to be the most experienced of the four institutes.

Because I felt that environments in which participants had more in common such as those for Beta Theta Pi may reveal different findings then those with participants with less in common, I chose to do Beta Theta Pi and I-LEAD® back to back for early comparison. I found there was some difference in facilitator approaches based on their connection to the organization.

Approach: My primary purpose was twofold (1) confirm if Michael's codes were correct and (2) to offer cases in which I thought more coding or different codes may have been presented.

I reviewed all interviews and provided areas in which Michael may code more, less or differently. Personally, I am inclined to excessively code – offering MANY codes – and then take the MANY and move them into more specific. I interpreted Michael's process to be reverse of mine. I found this acceptable and offered to him places where he may take his broad codes and provide subcodes.

Because I have familiarity with the participants and institutes, I provided some observations outside of just the codes. This included helping Michael interpret some themes or potential emerging theories.

Overall, I made slight alterations to the applications of codes – I suggested 25 additional occurrences of codes and 40 subtractions of occurrences of codes. I suggested that further description under each code be provided using quotes and text from the transcribed interviews, particularly with the most commonly coded quotes - student–centered, conducive learning environment, and expert presentation/delivery.

Interpretation of Michael's Findings: I did not find many places in which I feel Michael incorrectly coded. I offered advice about potentially different codes or places in which I found sub-codes, but overall I feel that Michael did well to identify what he did. I also feel that he did not let his relationship with the participants as well as familiarity with the institutes excessively cloud his judgment. Some bias likely occurred, as it would be impossible to have none; however, I feel that having me as an external auditor helped ensure the goodness of his research.

I feel that saturation was achieved based on recurring themes and codes. I could sense even after a few interviews that Michael's themes were well grounded in the data. I could look at even one interview from each of the four institutes and find commonalities. I feel there were very few cases of "outliers" or data points that stood out distinctively across interviews.

Actions: After my review Michael and I had three phone calls, each about 40 minutes. During these calls we reviewed my observations and discussed potential alterations and new approaches.

This concludes my external audit of Michael McRee's coding for his dissertation. I welcome the opportunity to discuss my approach and findings with you at a time that is convenient for both of us.

Sincerely,

Daniel A. Bureau, PhD
Director of Student Affairs Learning and Assessment
Adjunct Faculty, Higher and Adult Education
The University of Memphis